eCAF General

Customer	eCAF Customer Base
Date	November 2010

This document is based on a generic PROTOCOL eCAF system. Please note that some functionality may differ according to your specific customer configuration.

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Document Distribution

Document History

Date	Produced By	Comments
06/02/2008	K Athwal	Created
02/10/2008	Pauline Morgan	Added new ContactPoint information
1/2/2010	H Butler	Changed Subscriptions to Configure
15/10/2010	P Morgan	Updated manual with additional functionality of Other Name within update profile, locality now added to sorting of Worktray, reference to contact point removed, new screenshots added removing contactpoint references.

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Logging In

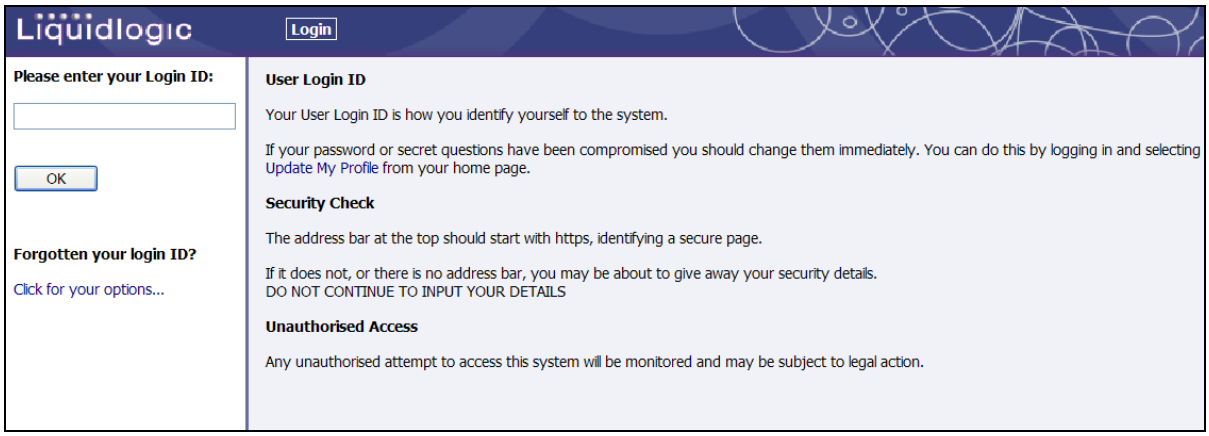
The system is internet browser based therefore you will need access to the internet and a web address to access the system.

If you have been provided with a shortcut to the application double click on the application icon.

If you have not been given access to an application icon the eCAF system can be found by accessing the internet and typing in a web address available from your system administrator.

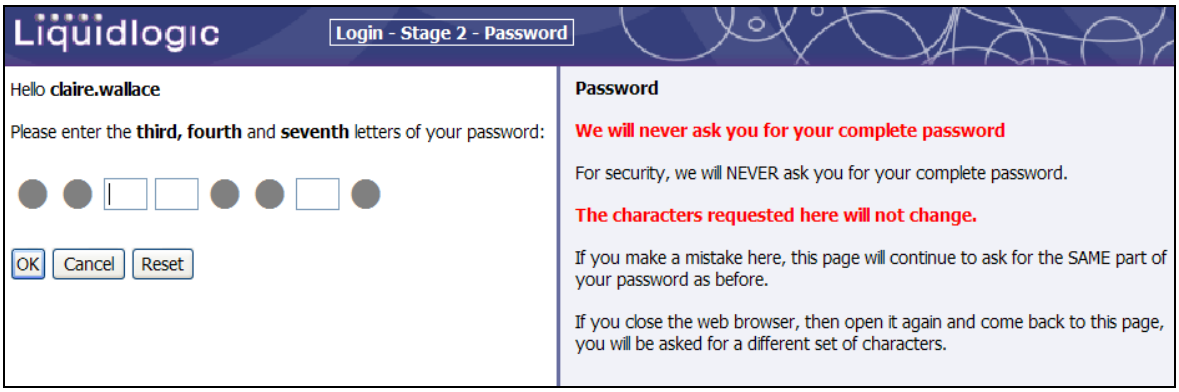
You will then be presented with a similar **User Login** screen

1. Enter your **Login ID** and click **OK**

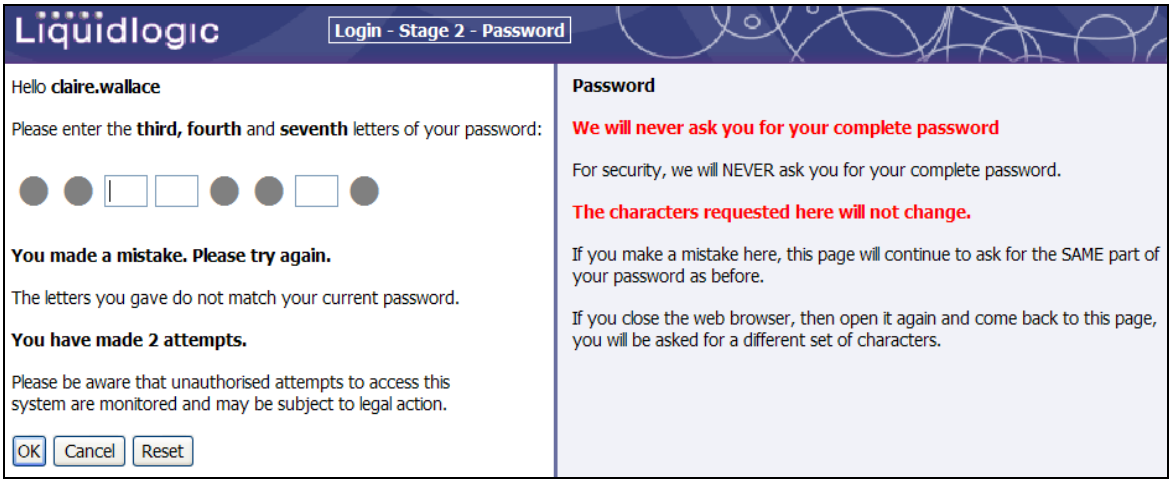

Liquidlogic
Login
Please enter your Login ID:
OK
Forgotten your login ID?
Click for your options...
User Login ID
Your User Login ID is how you identify yourself to the system.
If your password or secret questions have been compromised you should change them immediately. You can do this by logging in and selecting Update My Profile from your home page.
Security Check
The address bar at the top should start with https, identifying a secure page.
If it does not, or there is no address bar, you may be about to give away your security details.
DO NOT CONTINUE TO INPUT YOUR DETAILS
Unauthorised Access
Any unauthorised attempt to access this system will be monitored and may be subject to legal action.

You will then be prompted to enter random characters from your password (as below).

2. Enter the relevant characters and click **OK** to continue


Liquidlogic
Login - Stage 2 - Password
Hello claire.wallace
Please enter the third, fourth and seventh letters of your password:
OK
Cancel
Reset
Password
We will never ask you for your complete password
For security, we will NEVER ask you for your complete password.
The characters requested here will not change.
If you make a mistake here, this page will continue to ask for the SAME part of your password as before.
If you close the web browser, then open it again and come back to this page, you will be asked for a different set of characters.

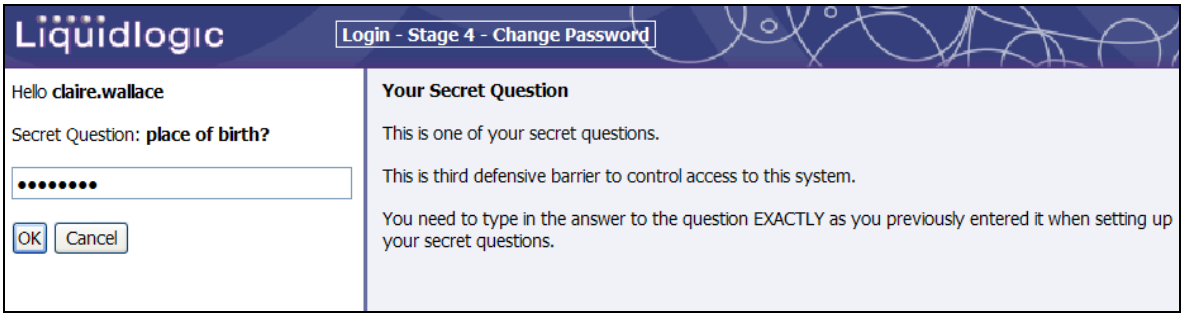
If you have entered your password incorrectly, a message will be displayed requiring you to input your password again


Liquidlogic
Login - Stage 2 - Password
Hello claire.wallace
Please enter the third, fourth and seventh letters of your password:
You made a mistake. Please try again.
The letters you gave do not match your current password.
You have made 2 attempts.
Please be aware that unauthorised attempts to access this system are monitored and may be subject to legal action.
OK
Cancel
Reset
Password
We will never ask you for your complete password
For security, we will NEVER ask you for your complete password.
The characters requested here will not change.
If you make a mistake here, this page will continue to ask for the SAME part of your password as before.
If you close the web browser, then open it again and come back to this page, you will be asked for a different set of characters.

You will have a number of attempts to log in, however with each incorrect attempt your account will be locked for a period of time. The more attempts you make to login with an incorrect password the more the period of time your account is locked out for will increase. If you get locked out, you will need to contact your system administrator to be released before attempting again.

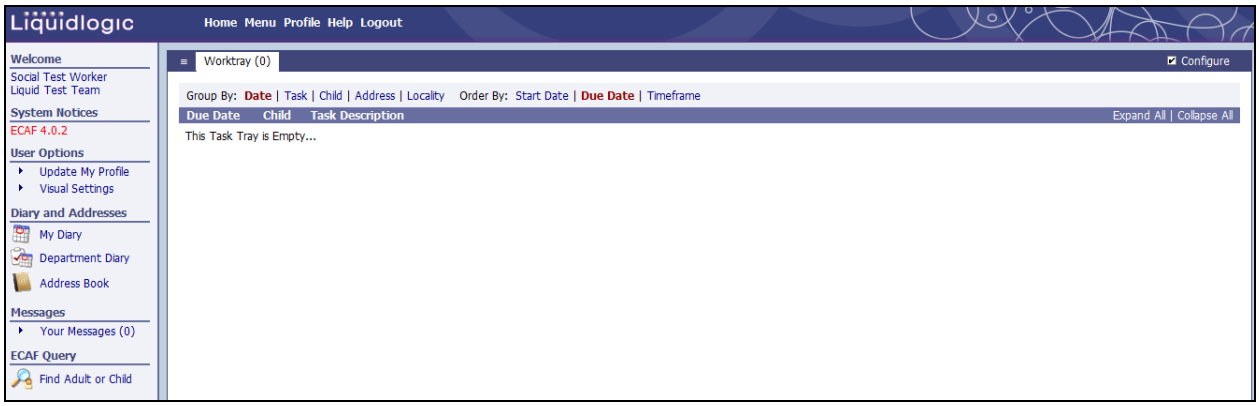
Once the password has been entered correctly you will be asked at random one of your security questions (see example below).

Please note: The use of secret questions is site specific therefore you may not be prompted for such information.


Liquidlogic
Login - Stage 4 - Change Password
Hello claire.wallace
Secret Question: place of birth?
OK
Cancel
Your Secret Question
This is one of your secret questions.
This is third defensive barrier to control access to this system.
You need to type in the answer to the question EXACTLY as you previously entered it when setting up your secret questions.

3. Enter the response to the **Security Question** and then click **OK** to continue

This will open your home page within the application. The options displayed on the home page will be dependant upon your access profile.

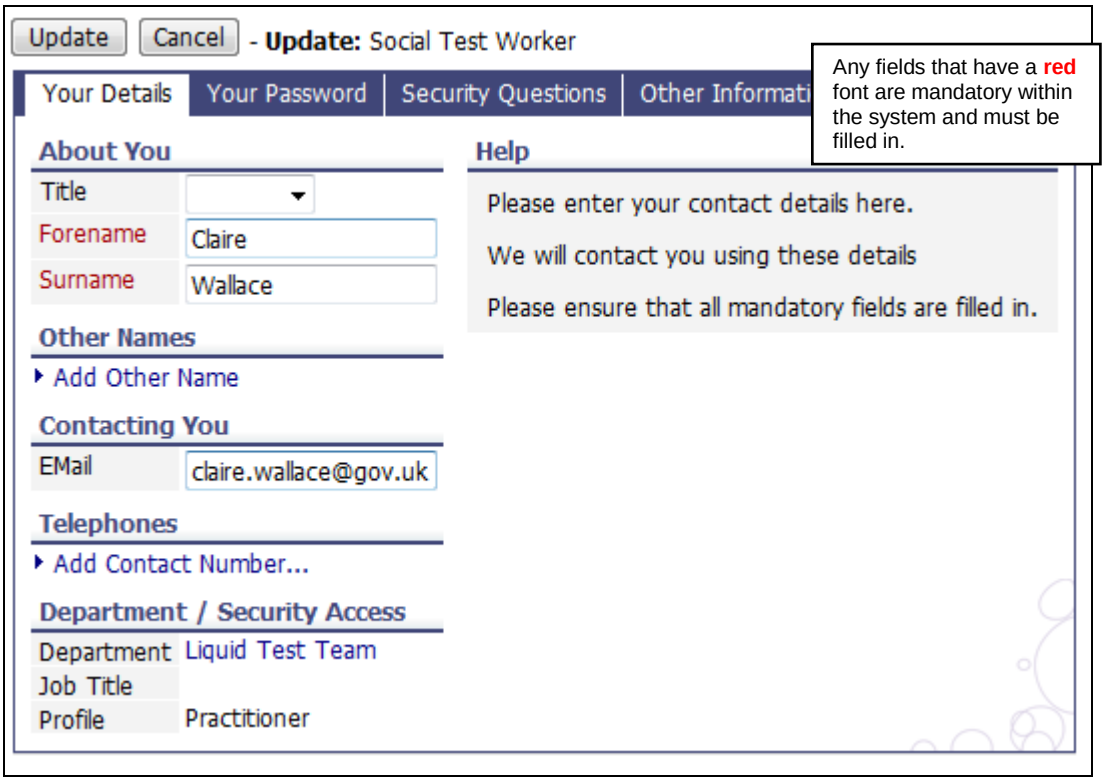


Please Note: If you have not been supplied with a login ID and password contact your system administrator.

Updating Your Profile

The **Update My Profile** option allows you to view and update your personal details. It is possible to update your name, contact details, password, security questions and any additional information at any time whilst using the system. Alongside each section there is Help text to explain what information is required and how it should be entered.

1. Click the **Update My Profile** option from your **Home Page** and the following screen will be displayed.



There are 4 tabs of information that can be updated/changed:

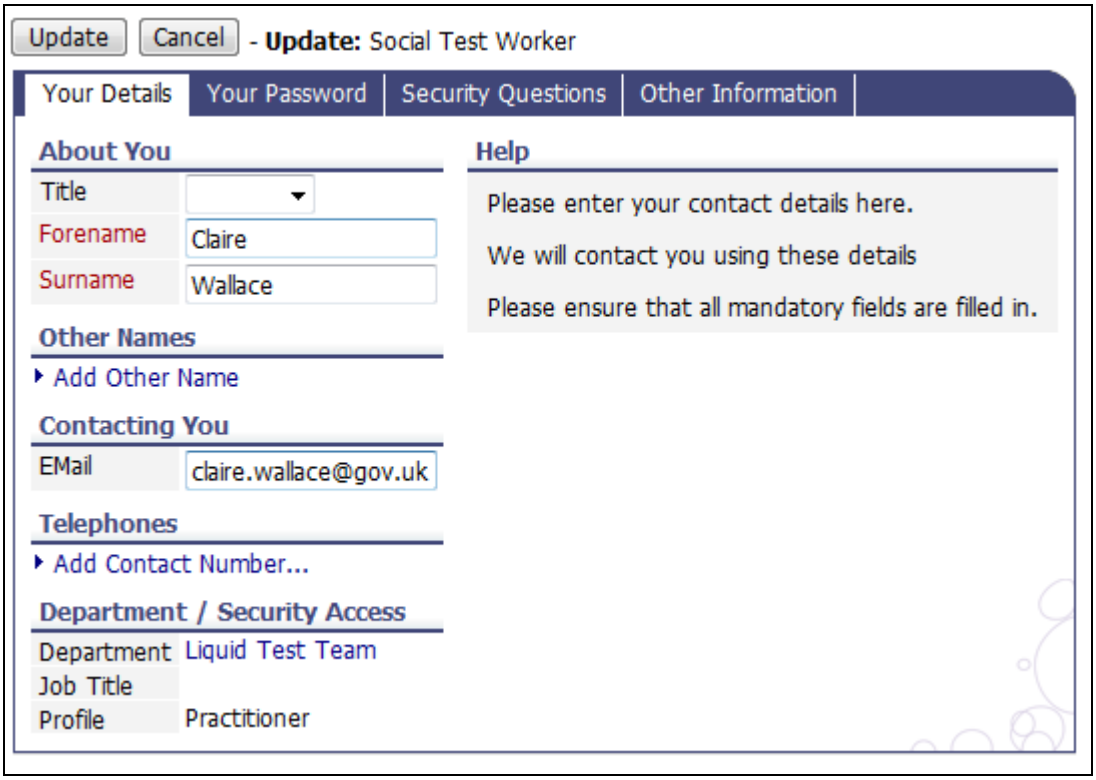
- **Your Details**
- **Your Password**
- **Security Questions**
- **Other Information**

Please see relevant sections below for updating each section:

Please Note: You will need to confirm your current password prior to clicking **Update**.

Your Details

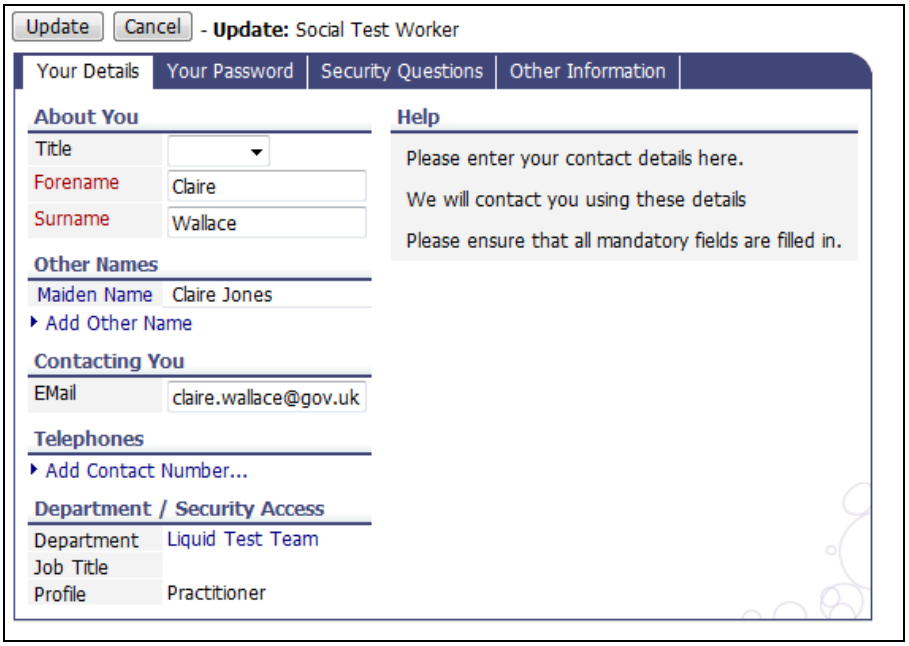
This tab contains your basic details e.g. Title, Forename, Surname, Other Names, Email and any contact telephone numbers that you want to add.



Updating/adding Other Names

Click on **Add Other Name** this will take you to the following screen

Select **type** from the drop down list and add forname and surname, click on **Create.** The main screen will then be updated to include additional names

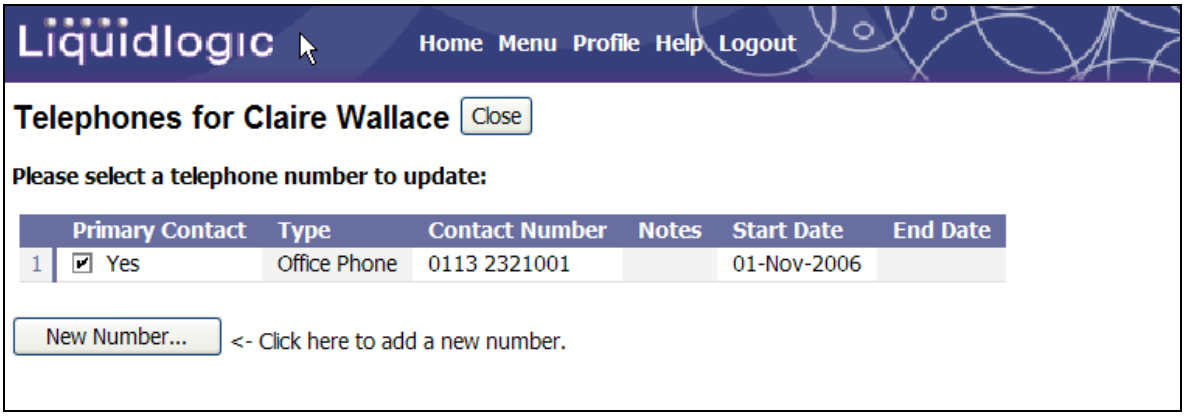


Updating Contact Numbers

Click on **Add Contact Number…,** this will take you to the following screen

Select a contact type from the **Type** drop down selection and enter the contact details in the appropriate screens.

Click on **Create Record** to save the contact information, this will take to a screen where further contact numbers can be added by selecting **New Number** or **Close** to close this screen and return to the **Updating Your Profile** screen.

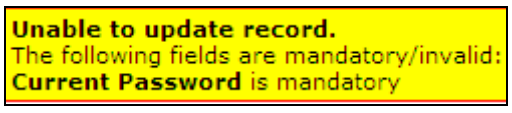


All contact numbers that have been added will now display under the section of **Telephones** on the **Your Details** tab. The telephone number set to be the primary contact number is the one showing in a bold font.

To make any changes/updates enter the new information into the fields displayed on the screen. On completion, prior to clicking **Update** you must accept the changes by confirming your password - to do this:

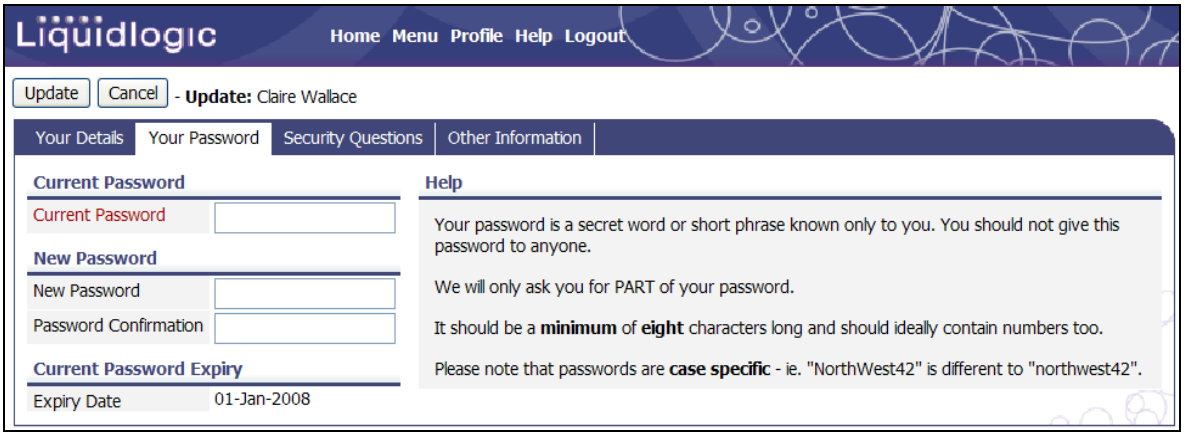
1. Click the **Your Password** Tab
2. Type your password into the **Current Password** field
3. Click **Update** to accept the changes

If you forget to do this the following message will appear:



Your Password

Select the **Your Password** tab


Liquidlogic
Home Menu Profile Help Logout
Update
Cancel
- Update: Claire Wallace
Your Details
Your Password
Security Questions
Other Information
Current Password
Current Password
New Password
New Password
Password Confirmation
Current Password Expiry
Expiry Date
01-Jan-2008
Help
Your password is a secret word or short phrase known only to you. You should not give this password to anyone.
We will only ask you for PART of your password.
It should be a minimum of eight characters long and should ideally contain numbers too.
Please note that passwords are case specific - ie. "NorthWest42" is different to "northwest42".

Passwords are set by the system to expire after a period of time. You will be notified by the system 7 days before your password is due to expire and then every day until it is changed or expires.

You can change your password at any time by following the steps below:

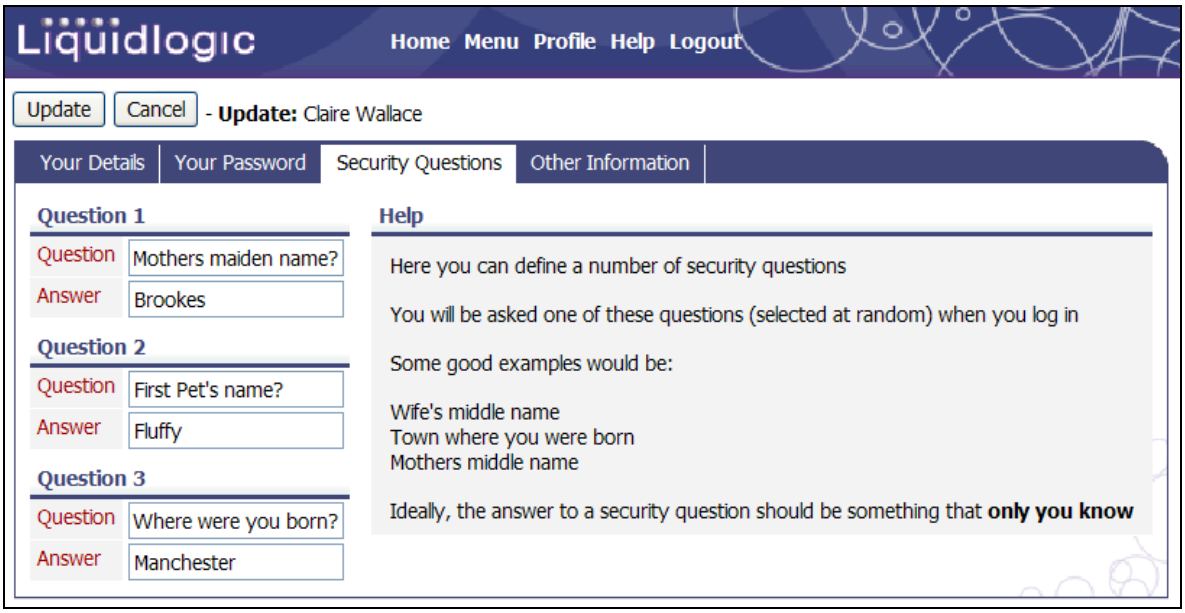
1. Enter your current password in the **Current Password** field
2. Enter your new password in the **New Password** field
3. Confirm your new password by entering it again in the **Password Confirmation** field
4. Click **Update** to accept the changes and return to your Home Page

Please Note: Your password must be at least 8 characters long and contain at least 2 numbers. Please see the Help information on screen for further information.

Security Questions

Please Note: The use of secret questions is site specific therefore you may not be prompted for such information.

1. Select the **Security Questions** tab

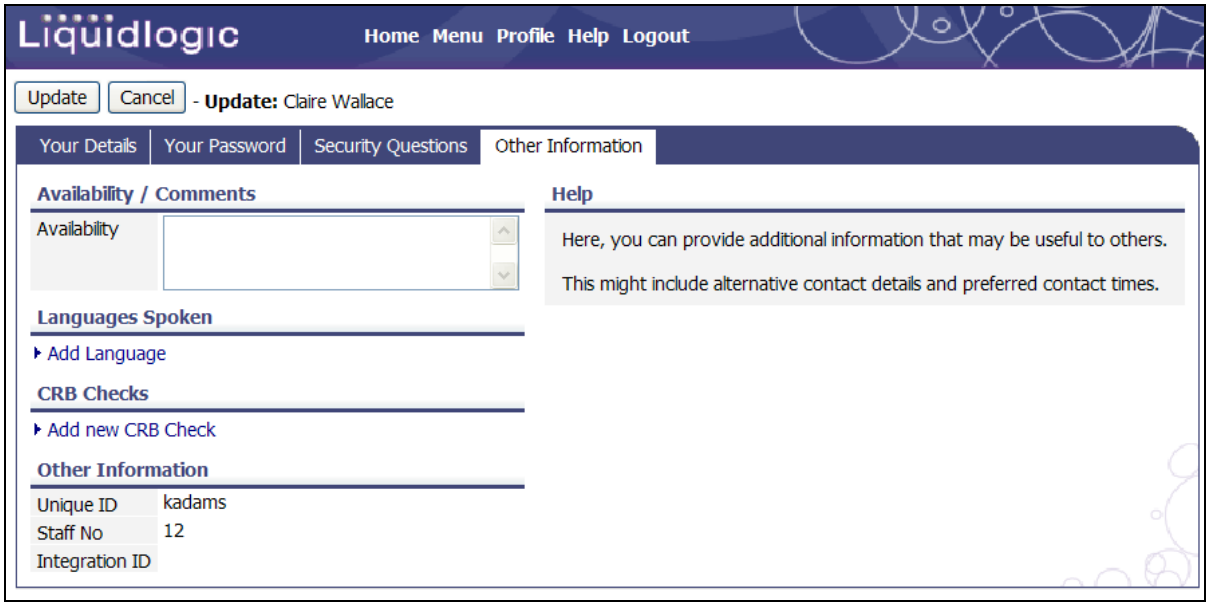


2. You can change/update your Security Questions and Answers at any time. On completion prior to clicking **Update** you must accept the changes by confirming your password.

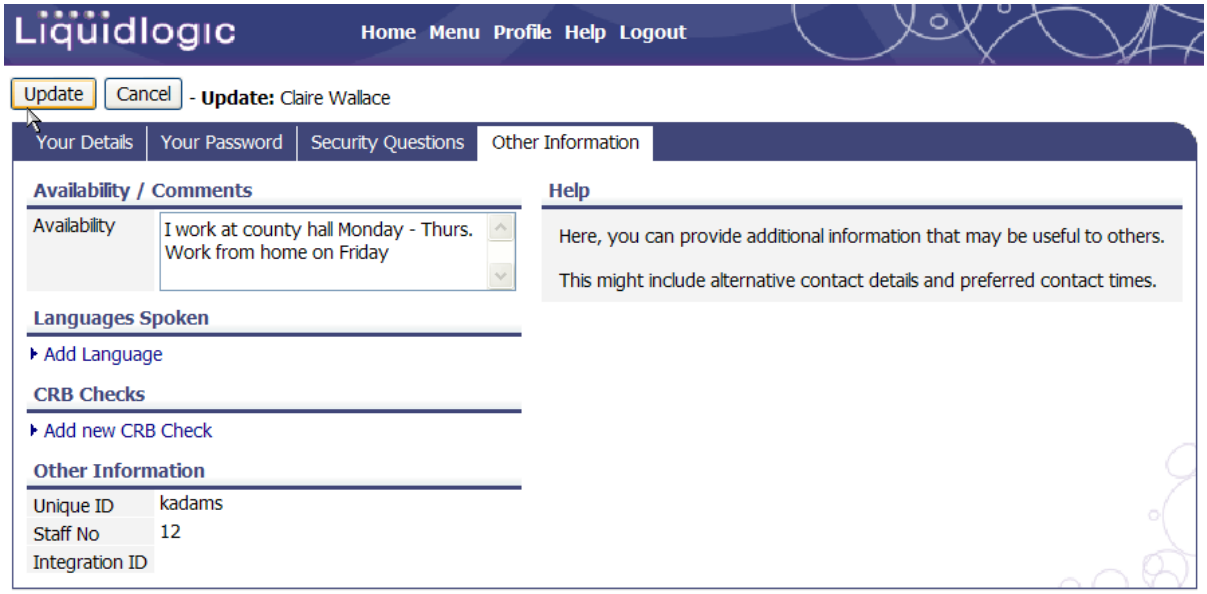
Please see the relevant instructions under **Your Details** if you unsure on how to do this.

Other Information

Select the **Other Information** tab



The **Availabilit**y free text box allows you to enter any additional information that you feel may be useful for other users to know. This could include alternative contact details, contact times or your availability (i.e. part time hours).

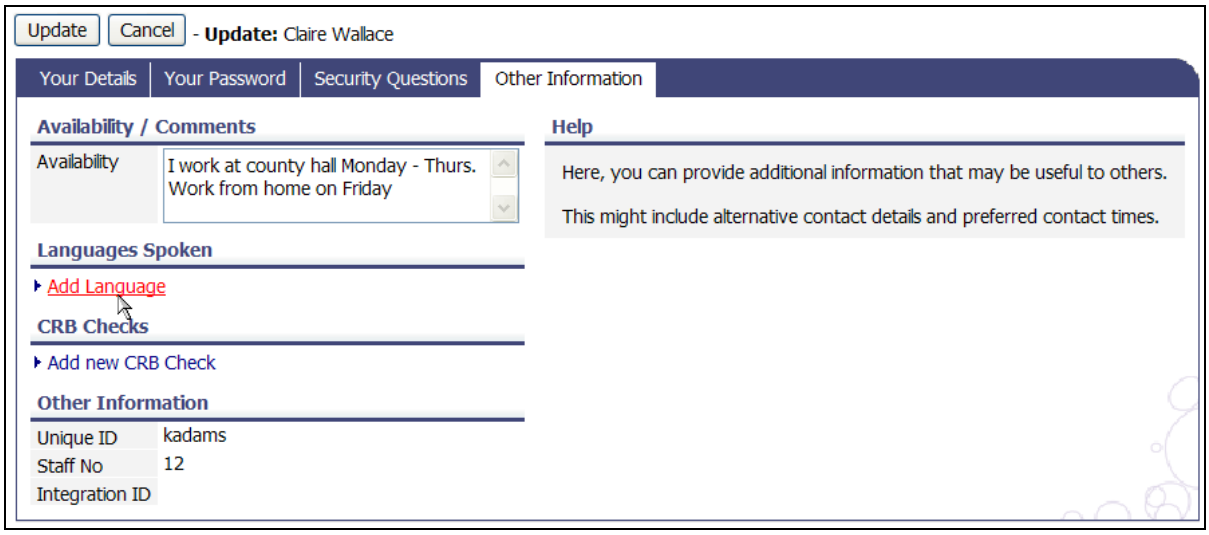

Liquidlogic
Home Menu Profile Help Logout
Update Cancel - Update: Claire Wallace
Your Details Your Password Security Questions Other Information
Availability / Comments
Availability
I work at county hall Monday - Thurs.
Work from home on Friday
Help
Here, you can provide additional information that may be useful to others.
This might include alternative contact details and preferred contact times.
Languages Spoken
Add Language
CRB Checks
Add new CRB Check
Other Information
Unique ID kadams
Staff No 12
Integration ID

On completion prior to clicking **Update** you must accept the changes by confirming your password. Please see the relevant instructions under **Your Details** if you unsure on how to do this.

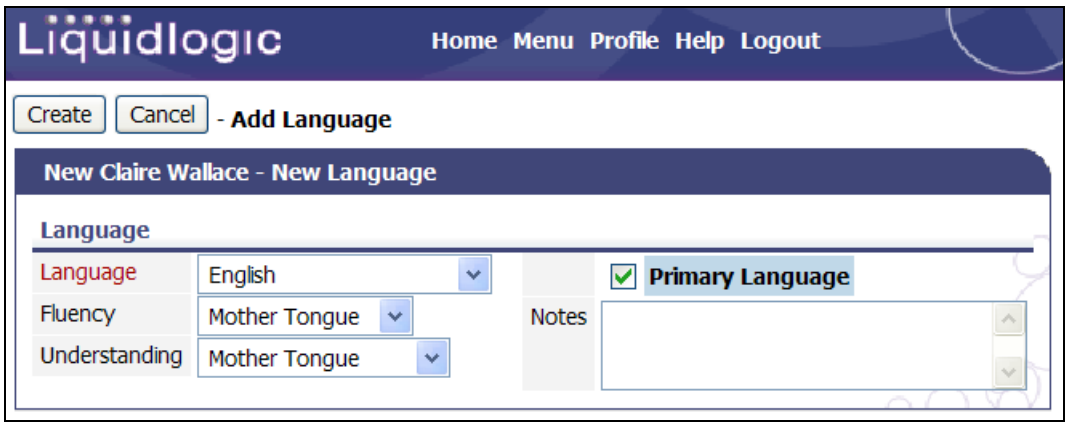
Additional Information such as languages spoken and CRB checks in relation to a PROTOCOL eCAF User can also be recorded.

Languages Spoken

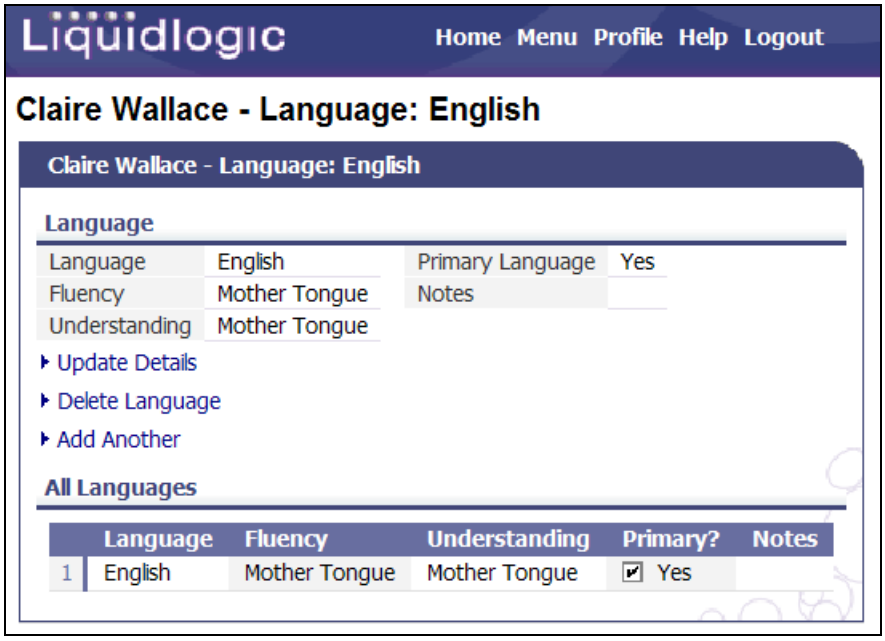
1. Click Add Language



2. Enter Language details using pick lists. If applicable select the Primary Language check box to mark the language primarily used



3. Click Create

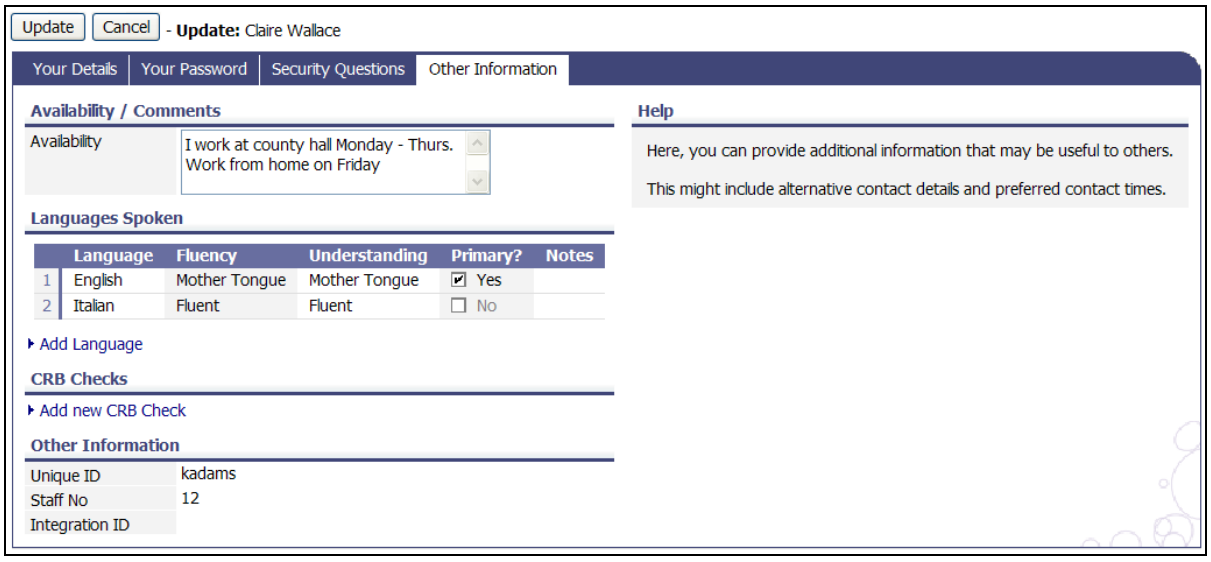


At this stage the language record can be amended using the Update Details link, or the language record can be removed using the Delete Language link or a further language can be added using the Add Another link.

4. To record further languages click Add Another

5. Follow steps 1 – 3 (above)

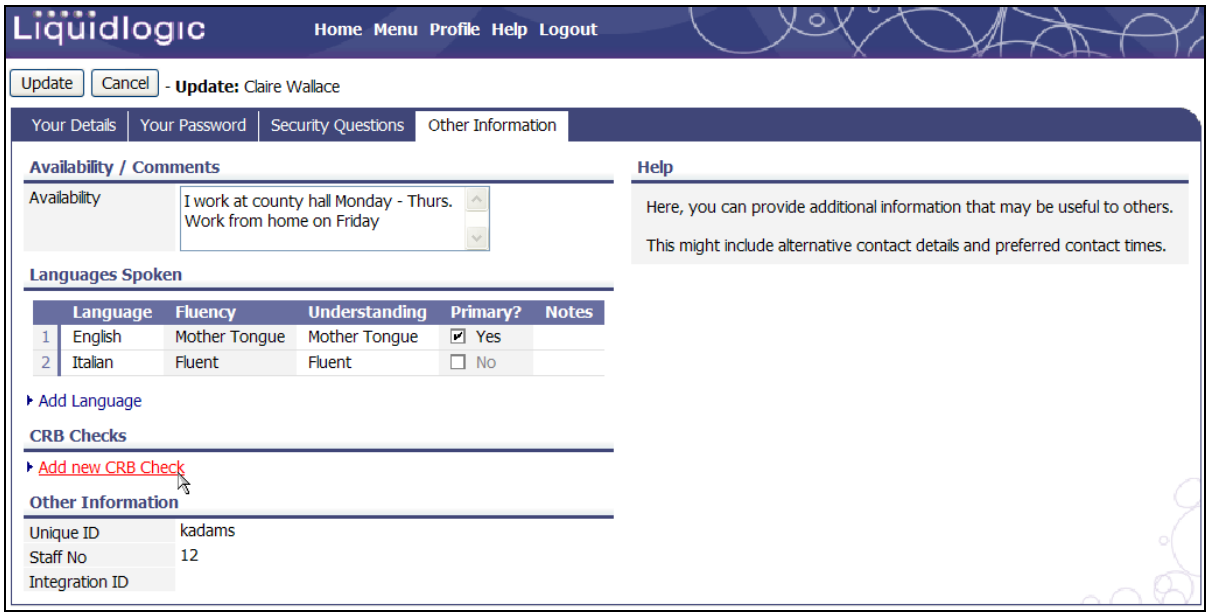
All languages will appear on the Other Information Tab



CRB Checks

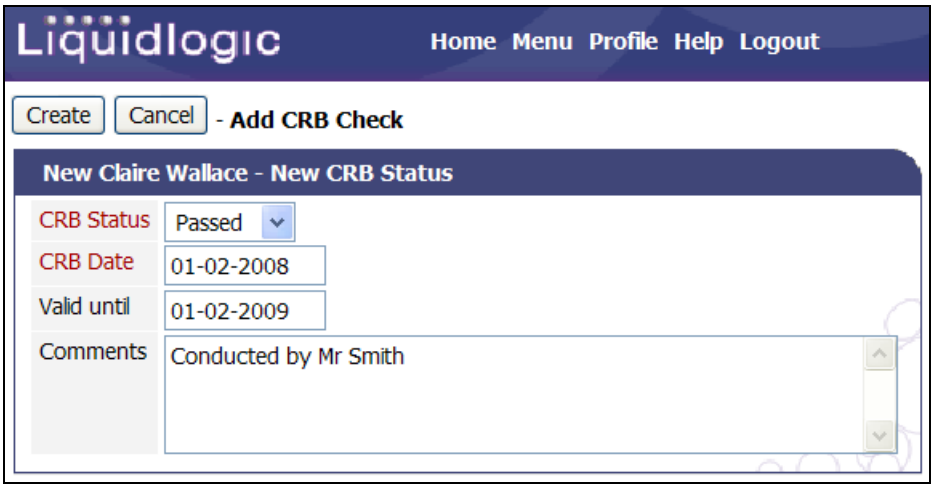
PROTOCOL eCAF also allows a user to input details of any Criminal Records Bureau (CRB) Checks performed (profile access right)

1. Click Add New CRB Check

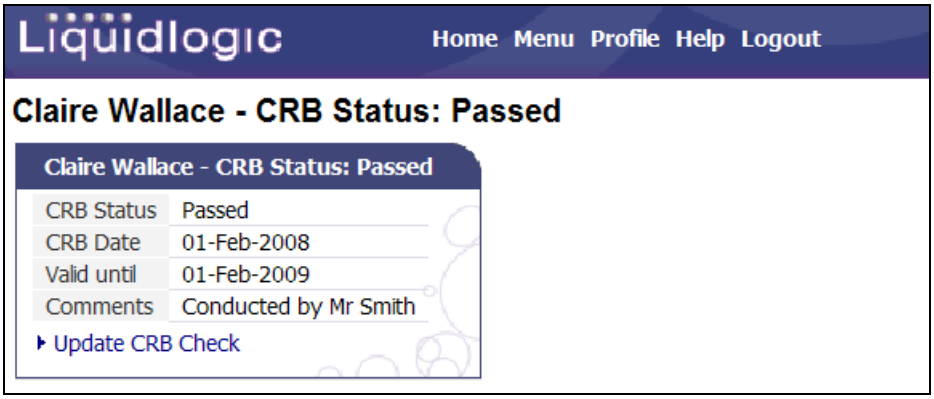


2. Enter CRB Check details

Please note: Cautioned and Failed CRB Checks can also be recorded using the CRB Status field on PROTOCOL eCAF



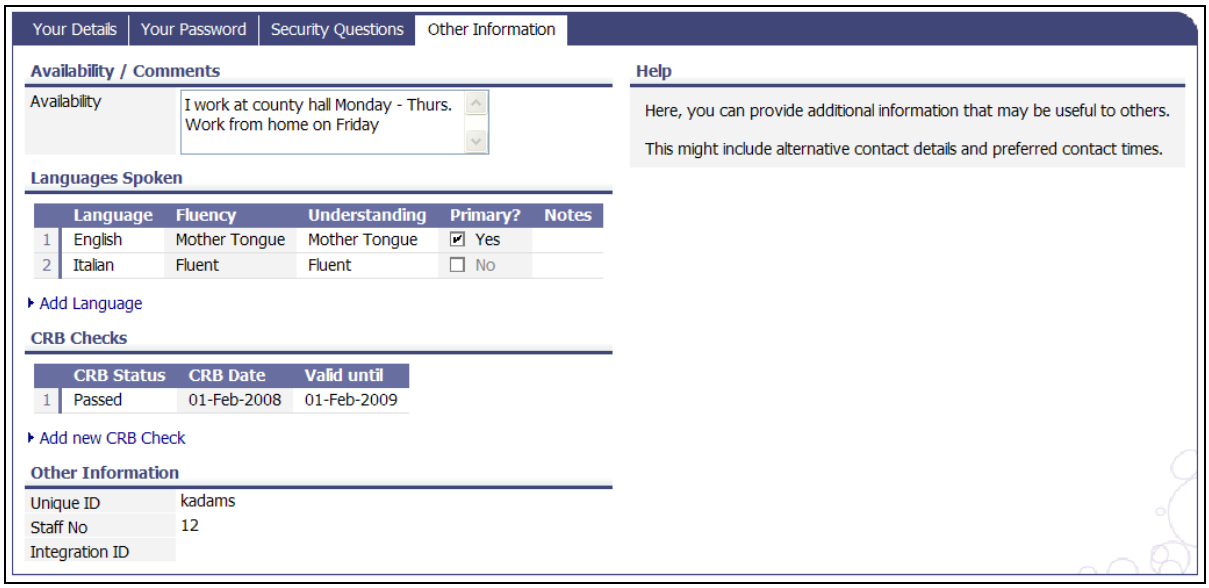
3. Click Create



4. To update details of any added CRB Checks to PROTOCOL eCAF, Click Update CRB Check

5. Click Update to save your changes

6. Your profile will display details of CRB Checks added on your profile

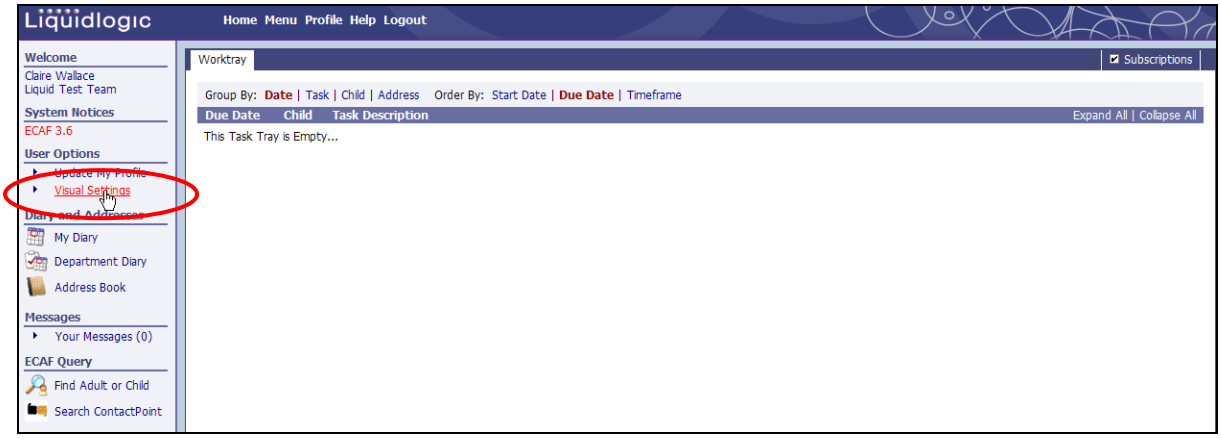

Your Details
Your Password
Security Questions
Other Information
Availability / Comments
Availability
I work at county hall Monday - Thurs.
Work from home on Friday
Help
Here, you can provide additional information that may be useful to others.
This might include alternative contact details and preferred contact times.
Languages Spoken
Language Fluency Understanding Primary? Notes
1 English Mother Tongue Mother Tongue Yes
2 Italian Fluent Fluent No
Add Language
CRB Checks
CRB Status CRB Date Valid until
1 Passed 01-Feb-2008 01-Feb-2009
Add new CRB Check
Other Information
Unique ID kadams
Staff No 12
Integration ID

Further CRB Checks can be recorded against your profile by following steps 1 – 3 (above)

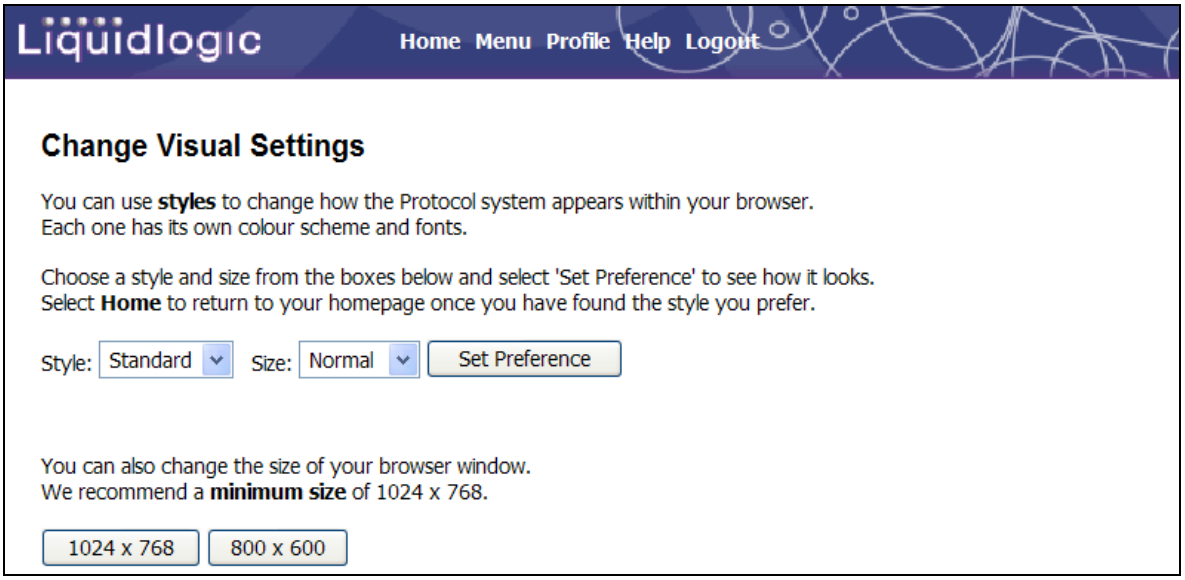
Updating the Visual Settings

You can amend the way the system looks i.e. font size and colour from within the system.

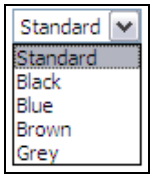
1. From the home page select **Visual Settings** from the **User Options** section.



This will take you to the following page:

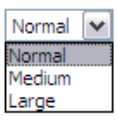

Liquidlogic
Home Menu Profile Help Logout
Change Visual Settings
You can use styles to change how the Protocol system appears within your browser.
Each one has its own colour scheme and fonts.
Choose a style and size from the boxes below and select 'Set Preference' to see how it looks.
Select Home to return to your homepage once you have found the style you prefer.
Style: Standard
Size: Normal
Set Preference
You can also change the size of your browser window.
We recommend a minimum size of 1024 x 768.
1024 x 768
800 x 600

2. Select the from the style menu, you will be given the following options:



By selecting any one of these options the colour throughout the system will change.

3. Repeat this for the size option:



These options will resize the text on the screen.

Once you have chosen your visual setting options, click **Set Preference** this will save and apply the settings.

Please Note: The larger the font size, the more the scroll bar may have to be used throughout the system to navigate through the screens.

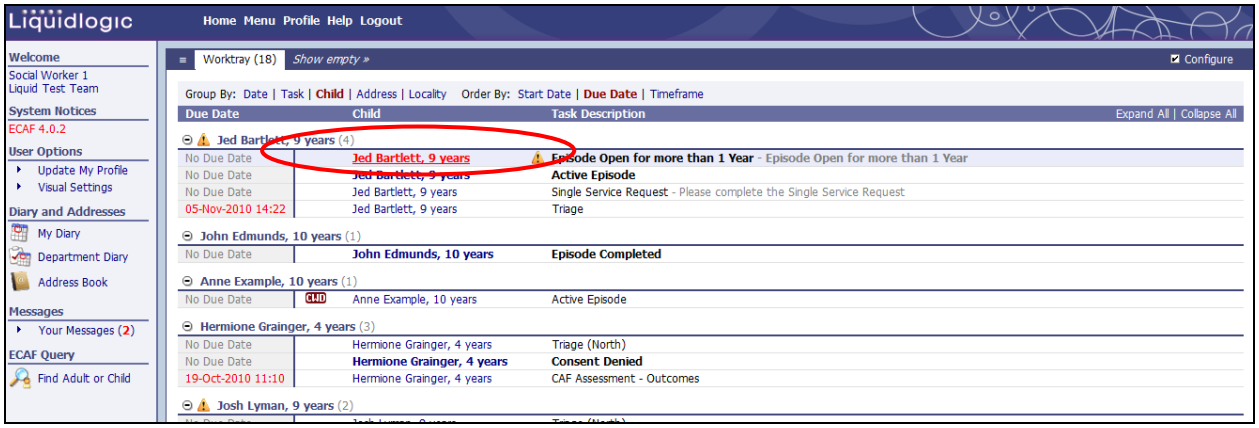
Worktrays

Your Worktray

When you log onto the system the profile that you have been set up with will determine what you can see and do within your worktray.

The **Worktray** is the area where you can view current tasks for the children you are involved with as well as viewing children that you are the Episode Co-ordinator for that may not have any current open tasks.

The two main areas of the worktray are the details relating to the **Child** and the **Task Description.** By clicking on the child's name you will be taken to the child's demographic tabs.


Liquidlogic
Home Menu Profile Help Logout
Welcome
Social Worker 1
Liquid Test Team
System Notices
ECAF 4.0.2
User Options
Update My Profile
Visual Settings
Diary and Addresses
My Diary
Department Diary
Address Book
Messages
Your Messages (2)
ECAF Query
Find Adult or Child
Worktray (18)
Show empty »
Configure
Group By: Date | Task | Child | Address | Locality Order By: Start Date | Due Date | Timeframe
Due Date Child Task Description
Expand All | Collapse All
Jed Bartlett, 9 years (4)
No Due Date Jed Bartlett, 9 years Episode Open for more than 1 Year - Episode Open for more than 1 Year
No Due Date Active Episode
No Due Date Jed Bartlett, 9 years Single Service Request - Please complete the Single Service Request
05-Nov-2010 14:22 Jed Bartlett, 9 years Triage
John Edmunds, 10 years (1)
No Due Date John Edmunds, 10 years Episode Completed
Anne Example, 10 years (1)
No Due Date CLIO Anne Example, 10 years Active Episode
Hermione Grainger, 4 years (3)
No Due Date Hermione Grainger, 4 years Triage (North)
No Due Date Hermione Grainger, 4 years Consent Denied
19-Oct-2010 11:10 Hermione Grainger, 4 years CAF Assessment - Outcomes
Josh Lyman, 9 years (2)

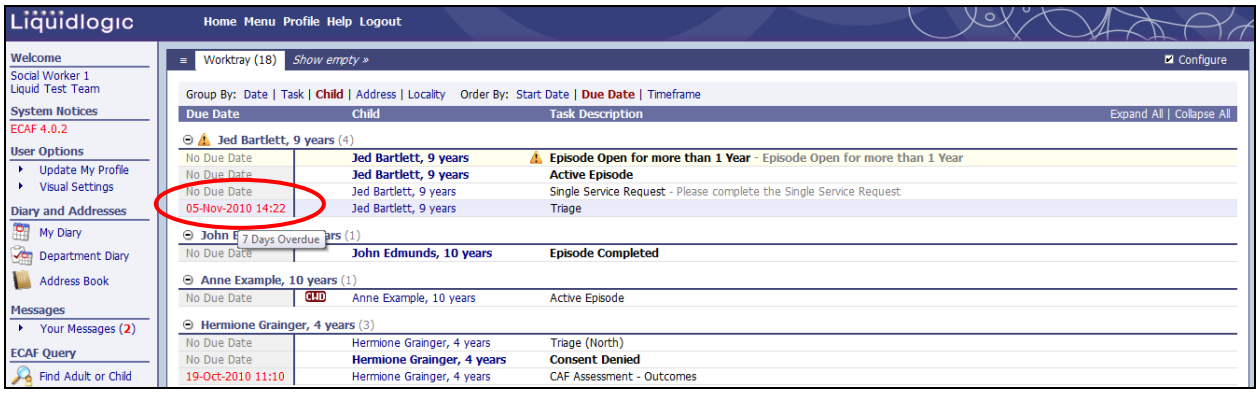
If the task description is selected you will be taken through to that task.

Any items that appear in the worktray that are in a bold font are new items that have not yet been accessed.

Ordering the Worktray

There are different ways in which you order the work in your **Worktray**. The default order of the tasks in the worktray is by **Date:**

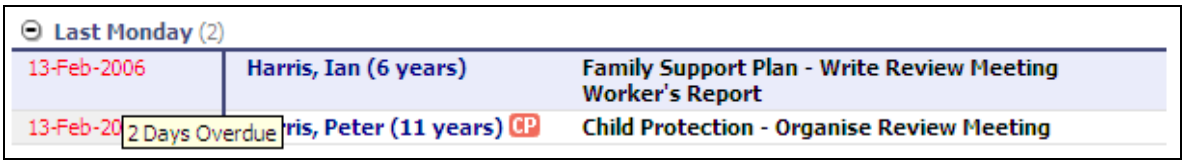
When the dates are displayed they grouped by due date; for example any tasks that are due next week will be listed together:



The dates are also colour coded:

- Red – tasks that are overdue
- Blue – tasks that are due today
- Green – tasks that are due tomorrow
- Black – tasks that are due in the future

If you hover your mouse over the due date of the task you will be told the number of days in which the task is due or overdue. These dates will only appear when a review has been organised.



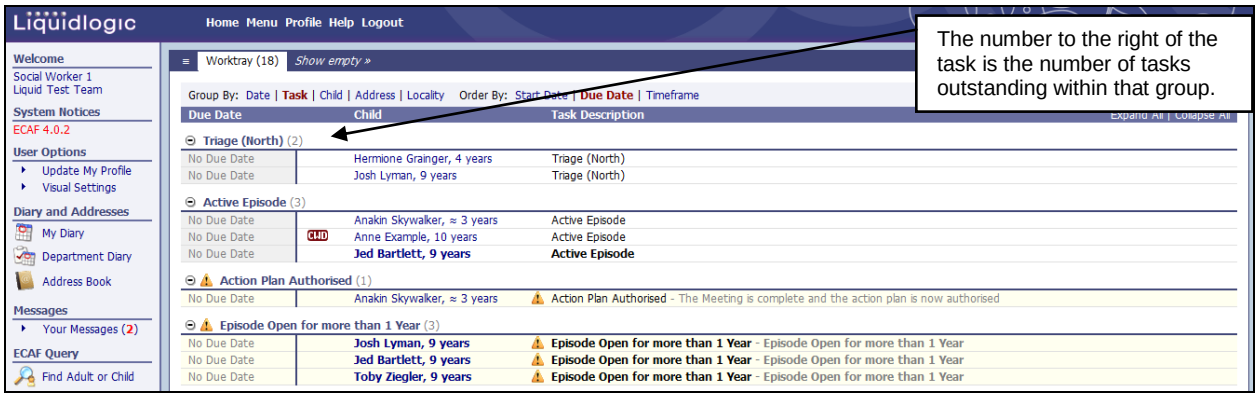
The other ways in which the outstanding tasks can be viewed are as follows:

- Task
- Child
- Address
- Locality

These can then be ordered by **Start Date, End Date** or **Timeframe.**

Order by Task

Click on the **Task** option from the **Group By** selection. This will group all of the tasks by their task rather than the date.


Liquidlogic
Home Menu Profile Help Logout
Welcome
Social Worker 1
Liquid Test Team
System Notices
ECAF 4.0.2
User Options
Update My Profile
Visual Settings
Diary and Addresses
My Diary
Department Diary
Address Book
Messages
Your Messages (2)
ECAF Query
Find Adult or Child
Worktray (18)
Show empty »
Group By: Date | Task | Child | Address | Locality Order By: Start Date | Due Date | Timeframe
Due Date
Child
Task Description
Expand All | Collapse All
Triage (North) (2)
No Due Date Hermione Grainger, 4 years Triage (North)
No Due Date Josh Lyman, 9 years Triage (North)
Active Episode (3)
No Due Date Anakin Skywalker, ≈ 3 years Active Episode
No Due Date CHILD Anne Example, 10 years Active Episode
No Due Date Jed Bartlett, 9 years Active Episode
Action Plan Authorised (1)
No Due Date Anakin Skywalker, ≈ 3 years Action Plan Authorised - The Meeting is complete and the action plan is now authorised
Episode Open for more than 1 Year (3)
No Due Date Josh Lyman, 9 years Episode Open for more than 1 Year - Episode Open for more than 1 Year
No Due Date Jed Bartlett, 9 years Episode Open for more than 1 Year - Episode Open for more than 1 Year
No Due Date Toby Ziegler, 9 years Episode Open for more than 1 Year - Episode Open for more than 1 Year
The number to the right of the task is the number of tasks outstanding within that group.

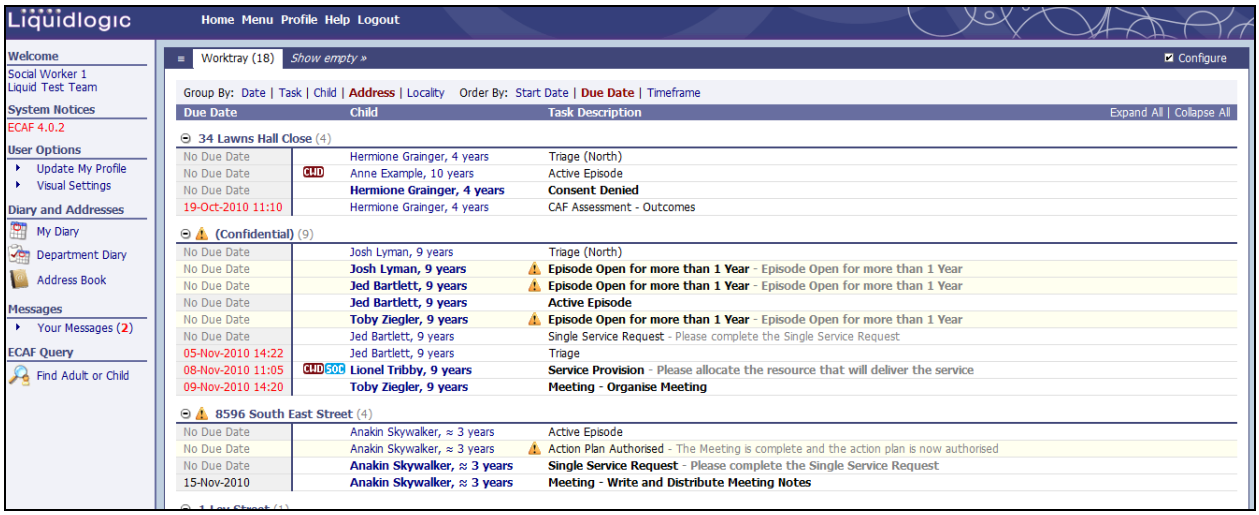
Order by Child

1. Click on the **Child** option from the **Group By** selection, this will group all of the tasks by the child.

Liquidlogic
Home Menu Profile Help Logout
Welcome
Social Worker 1
Liquid Test Team
System Notices
ECAF 4.0.2
User Options
Update My Profile
Visual Settings
Diary and Addresses
My Diary
Department Diary
Address Book
Messages
Your Messages (2)
ECAF Query
Find Adult or Child
Worktray (18)
Show empty »
Configure
Group By: Date | Task | Child | Address | Locality Order By: Start Date | Due Date | Timeframe
Due Date
Child
Task Description
Expand All | Collapse All
Jed Bartlett, 9 years (4)
No Due Date Jed Bartlett, 9 years Episode Open for more than 1 Year - Episode Open for more than 1 Year
No Due Date Jed Bartlett, 9 years Active Episode
No Due Date Jed Bartlett, 9 years Single Service Request - Please complete the Single Service Request
05-Nov-2010 14:22 Jed Bartlett, 9 years Triage
John Edmunds, 10 years (1)
No Due Date John Edmunds, 10 years Episode Completed
Anne Example, 10 years (1)
No Due Date CHILD Anne Example, 10 years Active Episode
Hermione Grainger, 4 years (3)
No Due Date Hermione Grainger, 4 years Triage (North)
No Due Date Hermione Grainger, 4 years Consent Denied
19-Oct-2010 11:10 Hermione Grainger, 4 years CAF Assessment - Outcomes

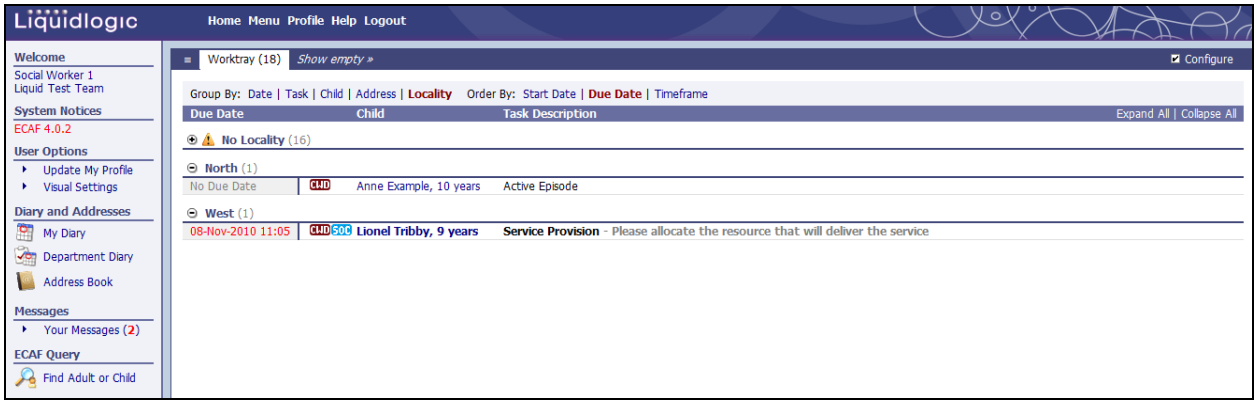
Order by Address

1. Click on the **Address** option from the **Group By** selection, this will group all of the tasks by the address of the child.


Liquidlogic
Home Menu Profile Help Logout
Welcome
Social Worker 1
Liquid Test Team
System Notices
ECAF 4.0.2
User Options
Update My Profile
Visual Settings
Diary and Addresses
My Diary
Department Diary
Address Book
Messages
Your Messages (2)
ECAF Query
Find Adult or Child
Worktray (18)
Show empty »
Configure
Group By: Date | Task | Child | Address | Locality Order By: Start Date | Due Date | Timeframe
Due Date
Child
Task Description
Expand All | Collapse All
34 Lawns Hall Close (4)
No Due Date Hermione Grainger, 4 years Triage (North)
No Due Date Anne Example, 10 years Active Episode
No Due Date Hermione Grainger, 4 years Consent Denied
19-Oct-2010 11:10 Hermione Grainger, 4 years CAF Assessment - Outcomes
(Confidential) (9)
No Due Date Josh Lyman, 9 years Triage (North)
No Due Date Josh Lyman, 9 years Episode Open for more than 1 Year - Episode Open for more than 1 Year
No Due Date Jed Bartlett, 9 years Episode Open for more than 1 Year - Episode Open for more than 1 Year
No Due Date Jed Bartlett, 9 years Active Episode
No Due Date Toby Ziegler, 9 years Episode Open for more than 1 Year - Episode Open for more than 1 Year
No Due Date Jed Bartlett, 9 years Single Service Request - Please complete the Single Service Request
05-Nov-2010 14:22 Jed Bartlett, 9 years Triage
08-Nov-2010 11:05 Lionel Tribby, 9 years Service Provision - Please allocate the resource that will deliver the service
09-Nov-2010 14:20 Toby Ziegler, 9 years Meeting - Organise Meeting
8596 South East Street (4)
No Due Date Anakin Skywalker, ≈ 3 years Active Episode
No Due Date Anakin Skywalker, ≈ 3 years Action Plan Authorised - The Meeting is complete and the action plan is now authorised
No Due Date Anakin Skywalker, ≈ 3 years Single Service Request - Please complete the Single Service Request
15-Nov-2010 Anakin Skywalker, ≈ 3 years Meeting - Write and Distribute Meeting Notes

Order by Locality

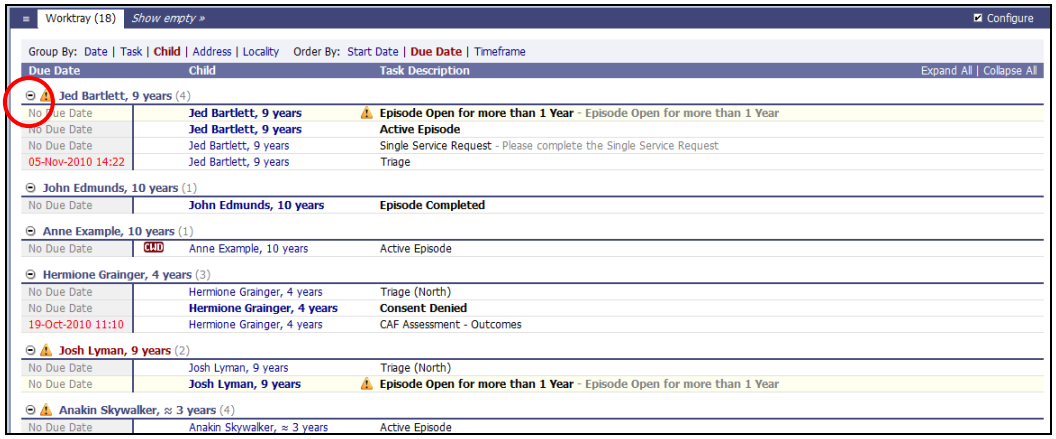
2. Click on the **Locality** option from the **Group By** selection, this will group all of the tasks by the locality of the child.



Expanding and Collapsing the Worktray

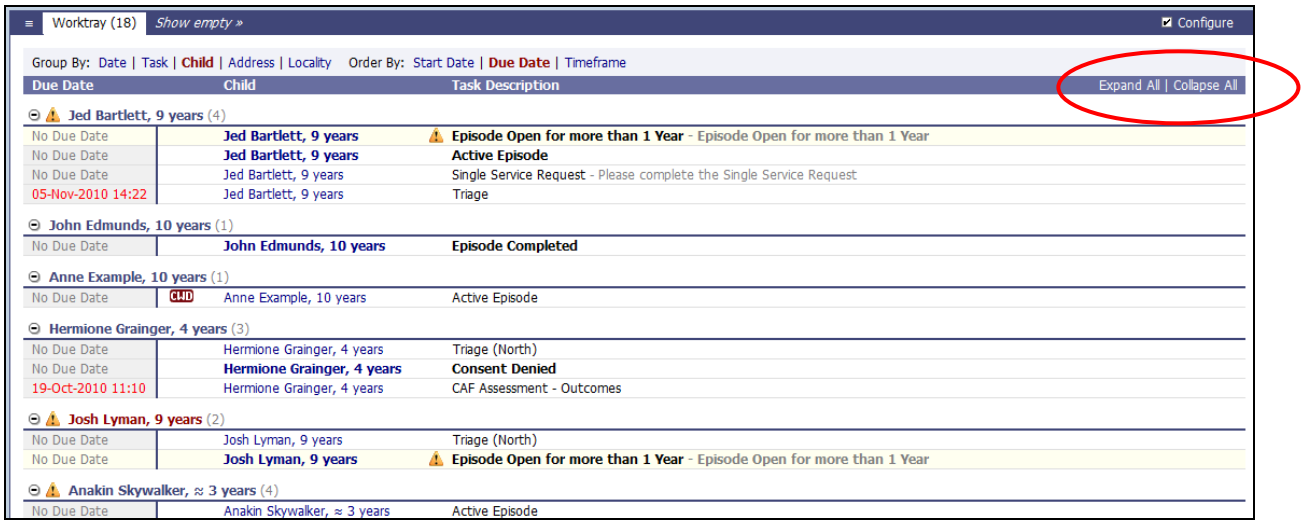
When viewing a worktray you are able to expand and collapse different sections individually or all sections together.

To expand or collapse an individual section click on the plus or minus icon to the left side of the appropriate selection:

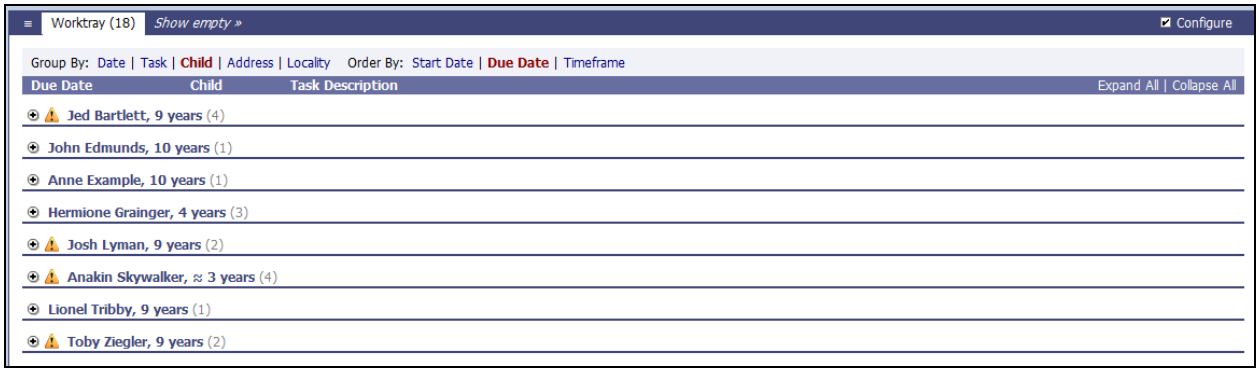

Worktray (18)
Show empty »
Configure
Group By: Date | Task | Child | Address | Locality Order By: Start Date | Due Date | Timeframe
Due Date
Child
Task Description
Expand All | Collapse All
Jed Bartlett, 9 years (4)
No Due Date Jed Bartlett, 9 years Episode Open for more than 1 Year - Episode Open for more than 1 Year
No Due Date Jed Bartlett, 9 years Active Episode
No Due Date Jed Bartlett, 9 years Single Service Request - Please complete the Single Service Request
05-Nov-2010 14:22 Jed Bartlett, 9 years Triage
John Edmunds, 10 years (1)
No Due Date John Edmunds, 10 years Episode Completed
Anne Example, 10 years (1)
No Due Date CHD Anne Example, 10 years Active Episode
Hermione Grainger, 4 years (3)
No Due Date Hermione Grainger, 4 years Triage (North)
No Due Date Hermione Grainger, 4 years Consent Denied
19-Oct-2010 11:10 Hermione Grainger, 4 years CAF Assessment - Outcomes
Josh Lyman, 9 years (2)
No Due Date Josh Lyman, 9 years Triage (North)
No Due Date Josh Lyman, 9 years Episode Open for more than 1 Year - Episode Open for more than 1 Year
Anakin Skywalker, ≈ 3 years (4)
No Due Date Anakin Skywalker, ≈ 3 years Active Episode

If you want to expand or collapse all of the worktray follow the next steps:

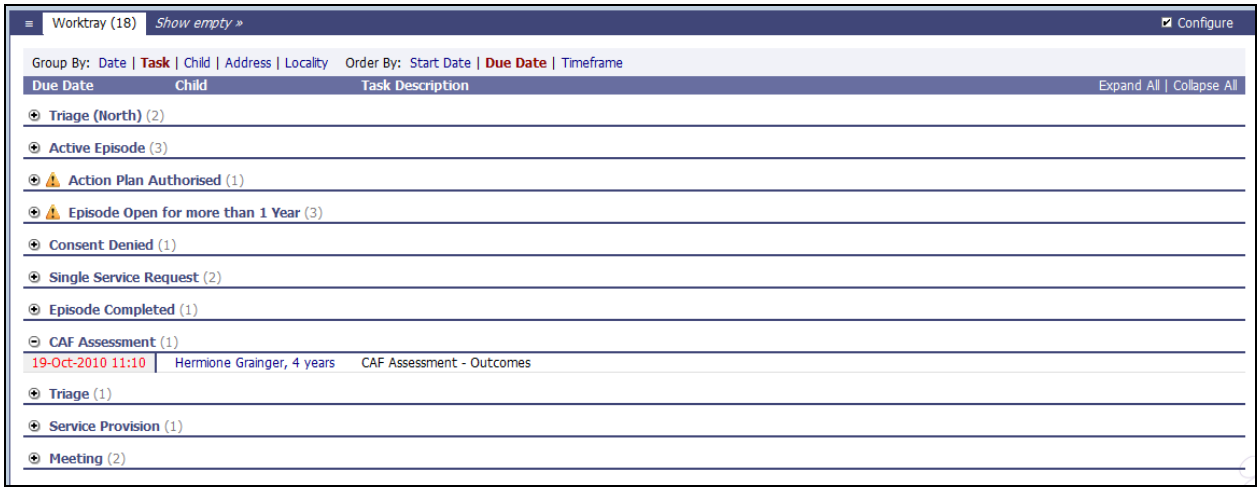
1. Click on the **Expand All or Collapse All** option from the header bar at the top of the worktray


Worktray (18)
Show empty »
Configure
Group By: Date | Task | Child | Address | Locality Order By: Start Date | Due Date | Timeframe
Due Date
Child
Task Description
Expand All | Collapse All
Jed Bartlett, 9 years (4)
No Due Date Jed Bartlett, 9 years Episode Open for more than 1 Year - Episode Open for more than 1 Year
No Due Date Jed Bartlett, 9 years Active Episode
No Due Date Jed Bartlett, 9 years Single Service Request - Please complete the Single Service Request
05-Nov-2010 14:22 Jed Bartlett, 9 years Triage
John Edmunds, 10 years (1)
No Due Date John Edmunds, 10 years Episode Completed
Anne Example, 10 years (1)
No Due Date CHD Anne Example, 10 years Active Episode
Hermione Grainger, 4 years (3)
No Due Date Hermione Grainger, 4 years Triage (North)
No Due Date Hermione Grainger, 4 years Consent Denied
19-Oct-2010 11:10 Hermione Grainger, 4 years CAF Assessment - Outcomes
Josh Lyman, 9 years (2)
No Due Date Josh Lyman, 9 years Triage (North)
No Due Date Josh Lyman, 9 years Episode Open for more than 1 Year - Episode Open for more than 1 Year
Anakin Skywalker, ≈ 3 years (4)
No Due Date Anakin Skywalker, ≈ 3 years Active Episode

This will expand or collapse all items within the worktray. You can then manually expand or collapse all work items within the group that you require.


Worktray (18)
Show empty »
Configure
Group By: Date | Task | Child | Address | Locality Order By: Start Date | Due Date | Timeframe
Due Date
Child
Task Description
Expand All | Collapse All
Jed Bartlett, 9 years (4)
John Edmunds, 10 years (1)
Anne Example, 10 years (1)
Hermione Grainger, 4 years (3)
Josh Lyman, 9 years (2)
Anakin Skywalker, ≈ 3 years (4)
Lionel Tribby, 9 years (1)
Toby Ziegler, 9 years (2)

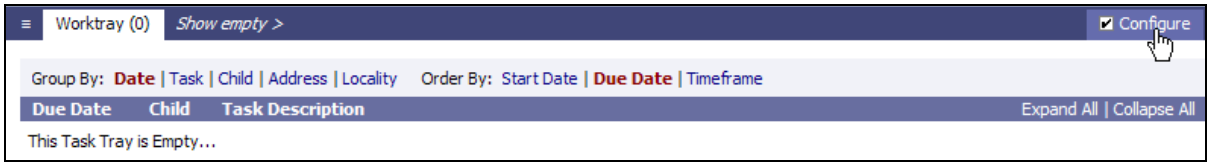
For example you may only want to view the items related to CAF Assessment:



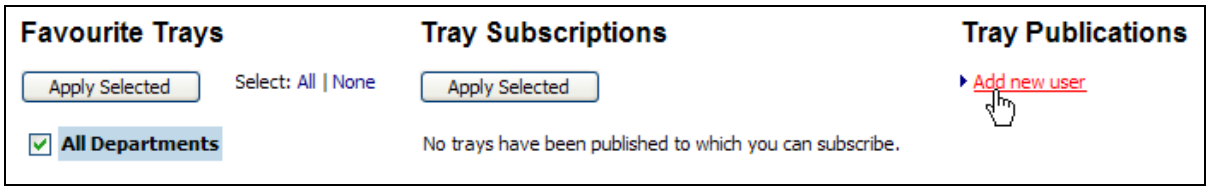
Worktray Subscriptions

The **Configure** option defines other user's access to your worktray. A user has the ability to select one or more users to give access to their worktray by managing their tray publications.
(NB: Users using this facility must also have access rights to the Child's CAF Assessment to be able to **pickup** tasks from the subscribers worktray.)

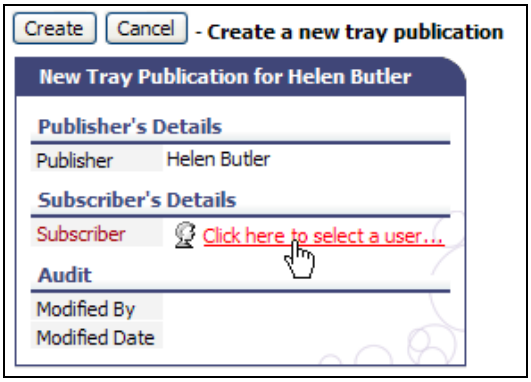
1. Select the **Configure** option from the worktray


Worktray (0)
Show empty >
Configure
Group By: Date | Task | Child | Address | Locality Order By: Start Date | Due Date | Timeframe
Due Date
Child
Task Description
Expand All | Collapse All
This Task Tray is Empty...

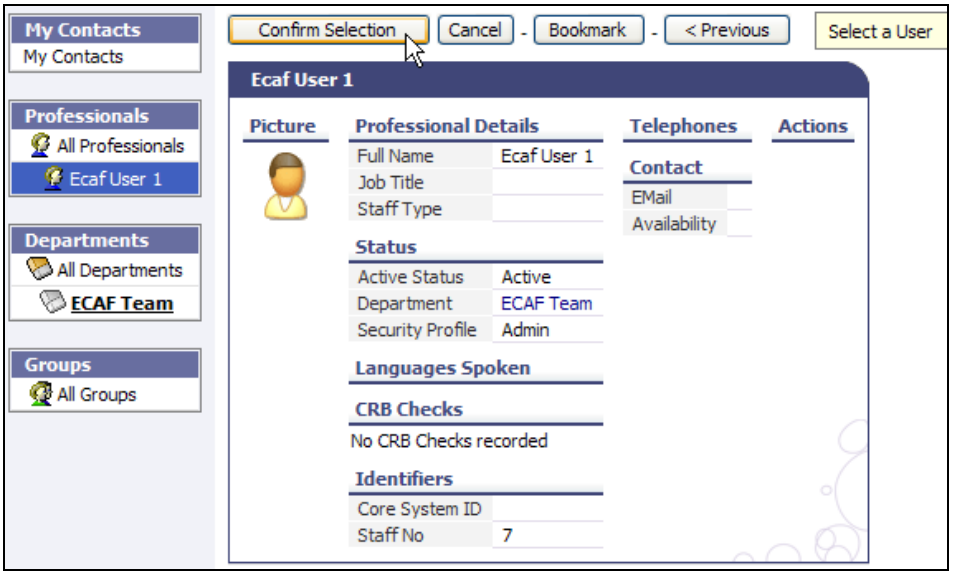
2. From the **Tray Publications** option select **Add new user**



3. The following screen will be displayed where you can select the person that you want to grant access to your tray. The Publisher is the owner of the tray and the subscriber is the user who has access to it. Select **Click here to select a user**



4. Click Browse for the required user and once selected click **Confirm Selection**



5. Once a user has been selected, click **Create.** The person selected will now be listed under **Manage Tray Publications.** To remove this person click on the ✖, this will disable the view of your worktray from this person's tray.

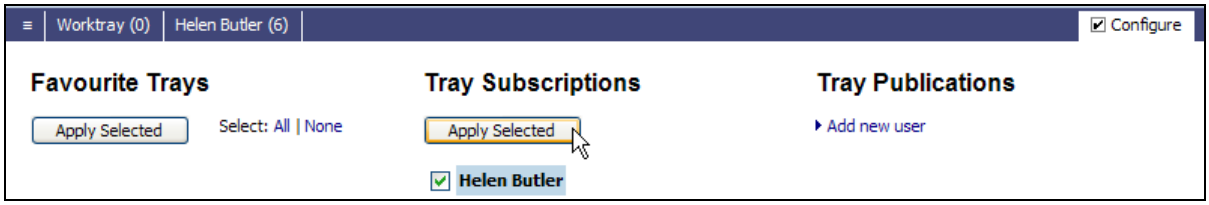
Any users that have subscribed to your worktray will be listed on the right hand side.

TIP: Click the **red cross** to remove a tray publication as required.

When the person who you have published your worktray to logs into the system and selects the Configure button to views their **Subscriptions** they will see the following screen:

6. To view a worktray listed under the **Tray Subscriptions** option select the check box of the users whose tray(s) you want to view and click on **Apply Selected**

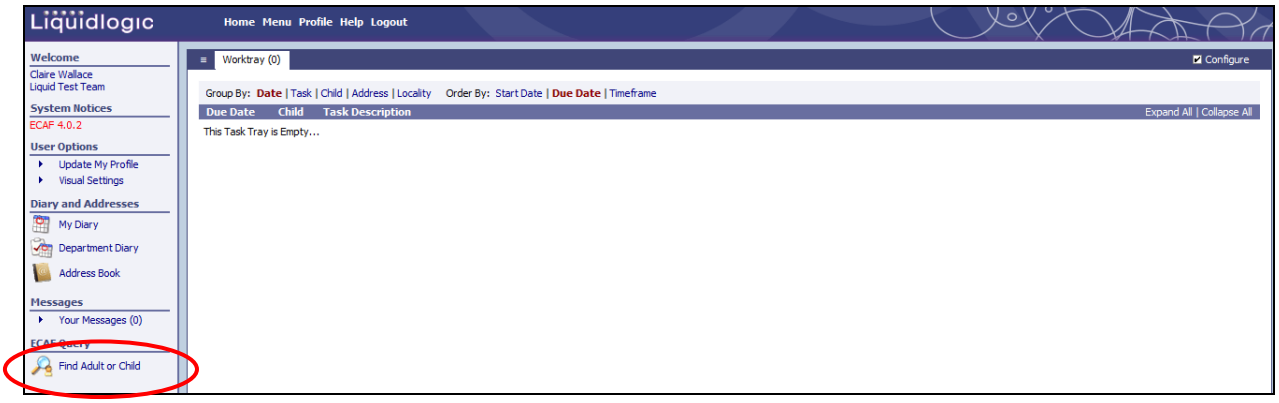
An additional worktray tab will now appear across the top of the screen which can be selected to view or pickup the tasks from this user.



TIP: To remove tray subscriptions select the **Configure** tab and remove the tick from the relevant user(s) and click **Apply Selected**.

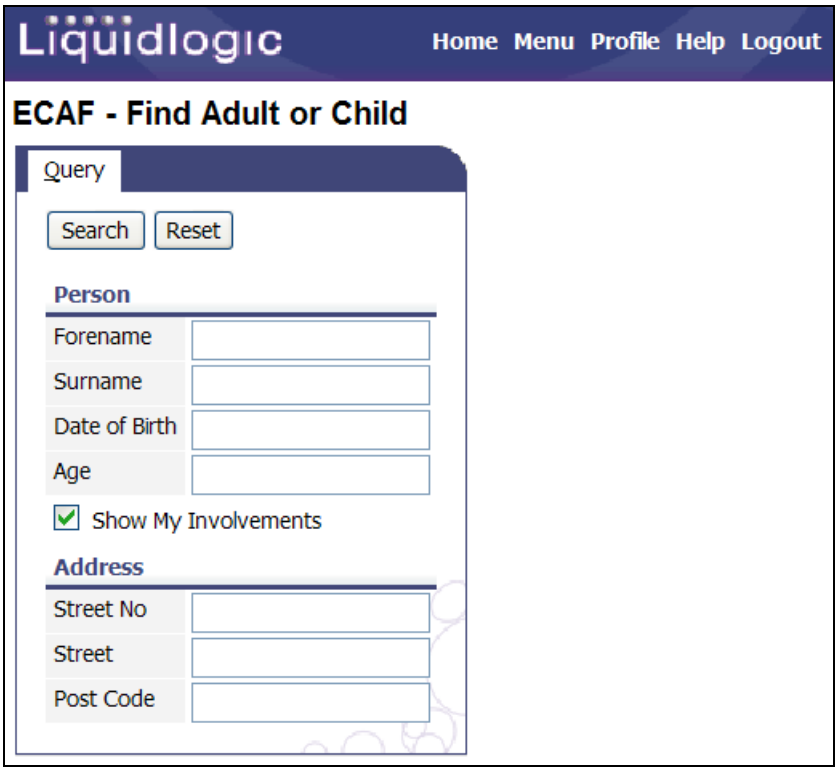
Searching

To search for a person held in the eCAF system, select the 'Find Adult or Child' link from the eCAF Query section on the home page:



Find Adult or Child

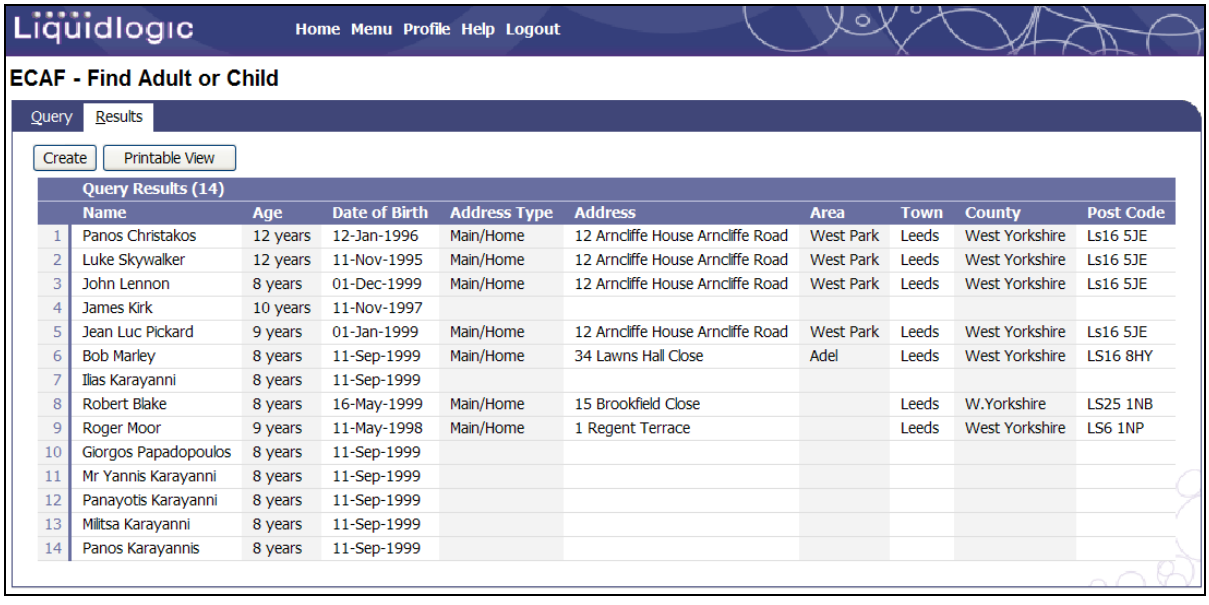
This Search facility allows the user to search for a child/young person or adult on the system using the various demographic fields as the search criteria. The option to search on a user's professional involvements is also available, see example below:



Within the Search screen there are a number of different search fields that can be used. You do not have to input data into every field, invariably, 'less is best' however; search results will differ depending upon how the data is entered into the search fields.

The fields available for searching are shown below:

Once a search has been conducted an additional tab will appear labelled 'Results'. A maximum of 100 results will be retrieved at any one time, therefore if the person you have searched for does not appear on the list you will need to refine your query by clicking on the 'Query' tab and entering further information.



	Name	Age	Date of Birth	Address Type	Address	Area	Town	County	Post Code
1	Panos Christakos	12 years	12-Jan-1996	Main/Home	12 Arncliffe House Arncliffe Road	West Park	Leeds	West Yorkshire	Ls16 5JE
2	Luke Skywalker	12 years	11-Nov-1995	Main/Home	12 Arncliffe House Arncliffe Road	West Park	Leeds	West Yorkshire	Ls16 5JE
3	John Lennon	8 years	01-Dec-1999	Main/Home	12 Arncliffe House Arncliffe Road	West Park	Leeds	West Yorkshire	Ls16 5JE
4	James Kirk	10 years	11-Nov-1997						
5	Jean Luc Pickard	9 years	01-Jan-1999	Main/Home	12 Arncliffe House Arncliffe Road	West Park	Leeds	West Yorkshire	Ls16 5JE
6	Bob Marley	8 years	11-Sep-1999	Main/Home	34 Lawns Hall Close	Adel	Leeds	West Yorkshire	LS16 8HY
7	Ilias Karayanni	8 years	11-Sep-1999						
8	Robert Blake	8 years	16-May-1999	Main/Home	15 Brookfield Close		Leeds	W.Yorkshire	LS25 1NB
9	Roger Moor	9 years	11-May-1998	Main/Home	1 Regent Terrace		Leeds	West Yorkshire	LS6 1NP
10	Giorgos Papadopoulos	8 years	11-Sep-1999						
11	Mr Yannis Karayanni	8 years	11-Sep-1999						
12	Panayotis Karayanni	8 years	11-Sep-1999						
13	Militsa Karayanni	8 years	11-Sep-1999						
14	Panos Karayannis	8 years	11-Sep-1999						

When searching within the system there may be names/addresses that you are unsure of the spelling. For example a surname of Stevenson could be spelt Stephenson or Stevenson. In circumstances like this we use something called a wildcard.

Using Wildcards

A 'wildcard' can be used to represent one, none or many characters. It can be added at the beginning, middle or end of the search criteria. Within the **PROTOCOL** system a 'wildcard' can either be an asterisk * or a percentage sign %.

Examples of searching using Wildcards:

a. Searching for a Person whose Surname is Brendan – this could have been entered into the database as Brendan, Brenden, Brendon, etc.

   To make searching for this person easier, you could enter a few characters of the Surname followed by * into the Surname field.

   For example:

   Surname = Brend*

   Click 'Search' and all the records whose Surname begins with Brend will appear. If the results set returned is too large, return to the search form and input any additional information for e.g. Date of Birth, to narrow down the search.

b. Searching for an 'Adult or Child' whose name is Daniel Smith – if you were to insert 'Smith' in the Surname field the search criteria will present you with a very large list of results. You could narrow this down by providing information in other fields available i.e. Forename.

   For example:

   Enter the whole surname in the Surname field and then enter the Forename followed by the * into the Forename field e.g.

   Forename = Dan*
   Surname = Smith

   Clicking on Search will then find you all records in the database for those people whose surname is Smith but only if their first names start with Dan.

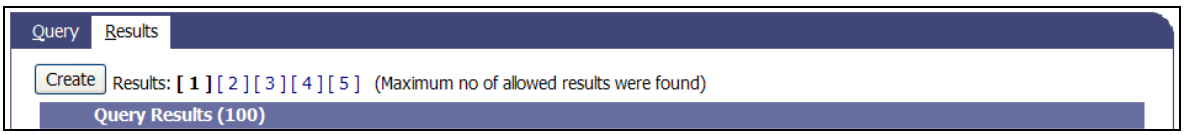
c. Searching for an 'Adult or Child' whose address is Flat 4, 29 Green Lane – the search will look on the first line of the address (generally the Street Name) therefore it is easier to narrow down the search by preceding the data entered into the address field with the * e.g.

   Address = *Green Lane

   Clicking on Search will then find all records for an 'Adult or Child' that have an address listed on Green Lane. If this is used along with data entered for Surname, the results list will be shorter.

It is recommended that 'wildcards' (* or %) always be used to improve the success of a search.

Please Note: if your results exceed the maximum of 100 (shown over 5 pages) the following message will appear:



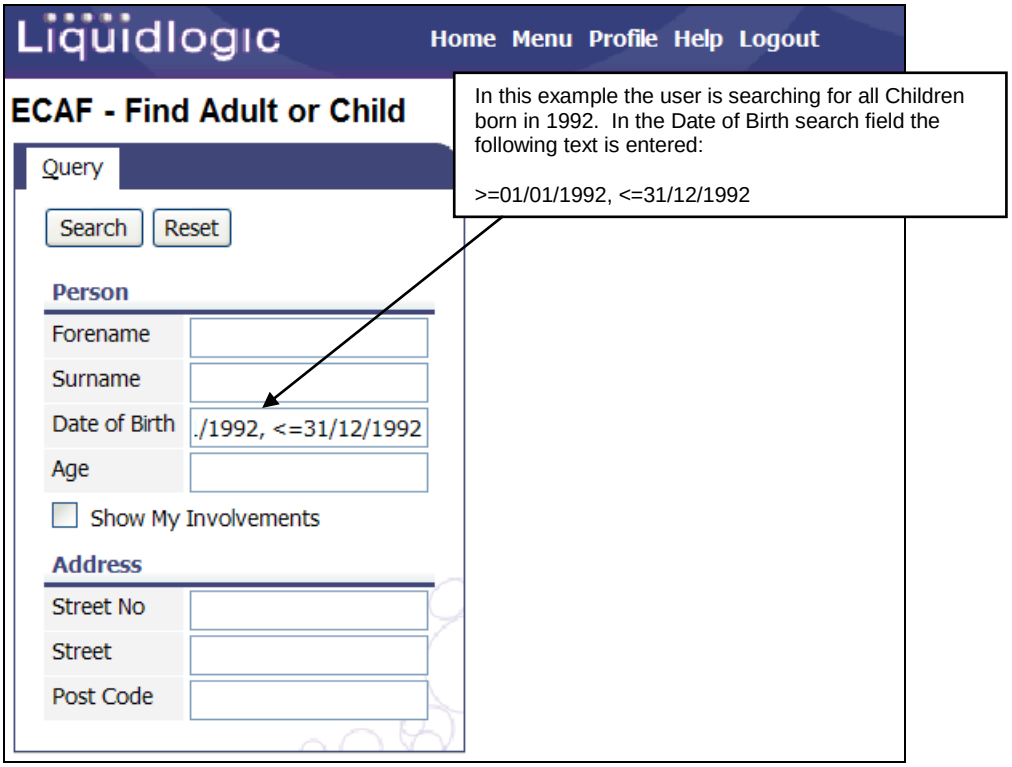
In this instance, you will need to enter more information into your search criteria to narrow down the results.

If there are no results matching the query the following message will be displayed:

Searching Using Dates of Birth

There may be times when searching for an 'Adult or Child' on the system you want to set parameters for the date of birth. For example you may know that the child was born sometime during 1992 but are unsure of the exact date.

The DOB search allows you to add search criteria into the field so that you can search for a date greater than a specified date and/or less than a specified date as shown below.



The results shown will only include anyone that is specified in the system having a date of birth in between these dates.

Performing a Search

1. Click the **Find Adult or Child** option from your **Home Page**

2. Enter your search criteria e.g. if you were searching for Arthur C Scott
   Forename: Art* (using the wildcard at the end of a forename will also capture anyone in the system that may also have a middle name.

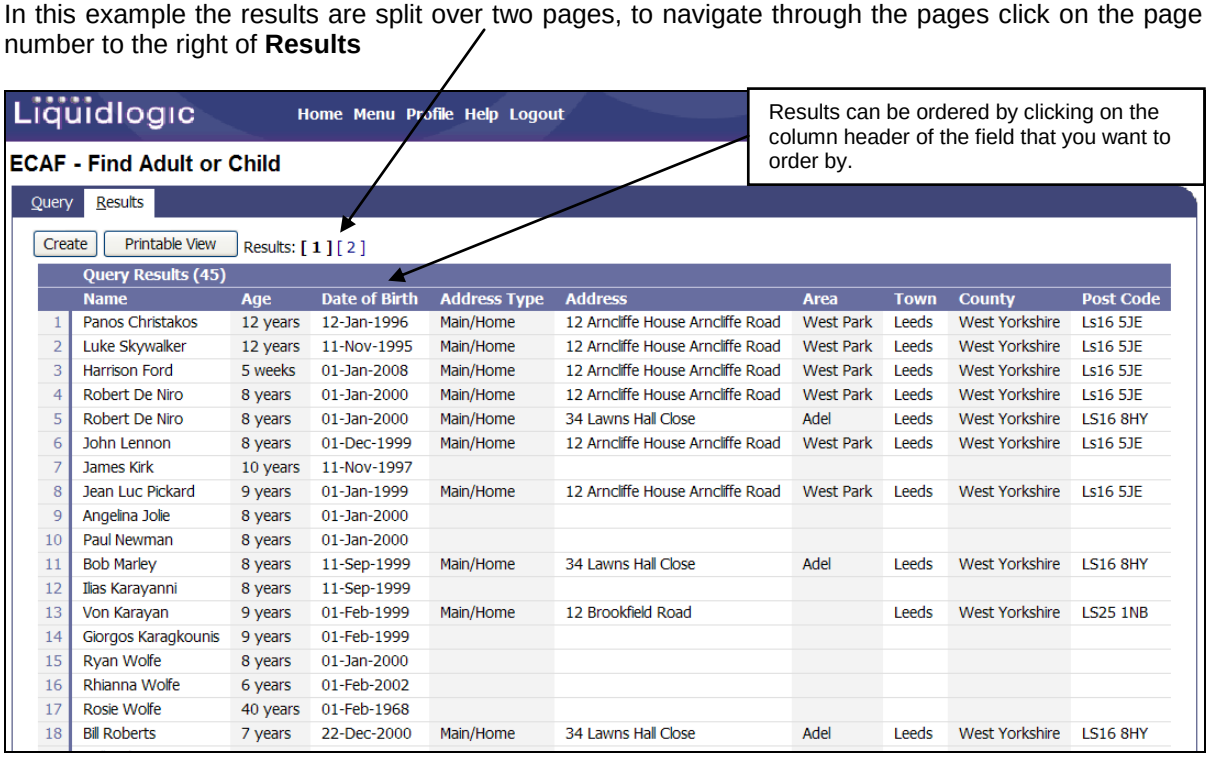
3. Surname:Scot*

4. Click on the **Search** button

If no results were returned, you can either amend your search for example by deleting the search criteria manually in each field or click the **Reset** button

Once a list of returned results appear click on the required entry to view the adult or child's personal information.

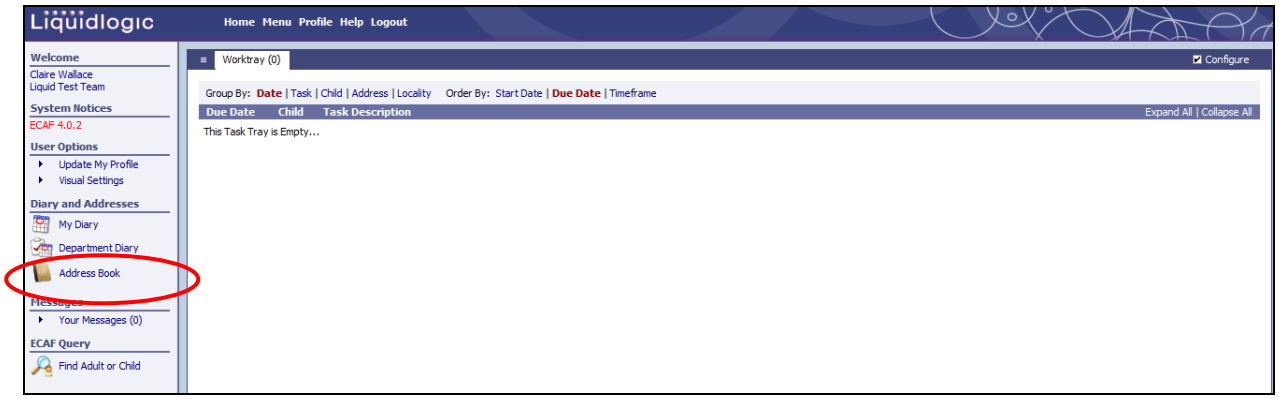
In this example the results are split over two pages, to navigate through the pages click on the page number to the right of **Results**


Liquidlogic
Home Menu Profile Help Logout
ECAF - Find Adult or Child
Query Results
Create Printable View Results: [1] [2]
Results can be ordered by clicking on the column header of the field that you want to order by.
Query Results (45)
Name Age Date of Birth Address Type Address Area Town County Post Code
1 Panos Christakos 12 years 12-Jan-1996 Main/Home 12 Arncliffe House Arncliffe Road West Park Leeds West Yorkshire Ls16 5JE
2 Luke Skywalker 12 years 11-Nov-1995 Main/Home 12 Arncliffe House Arncliffe Road West Park Leeds West Yorkshire Ls16 5JE
3 Harrison Ford 5 weeks 01-Jan-2008 Main/Home 12 Arncliffe House Arncliffe Road West Park Leeds West Yorkshire Ls16 5JE
4 Robert De Niro 8 years 01-Jan-2000 Main/Home 12 Arncliffe House Arncliffe Road West Park Leeds West Yorkshire Ls16 5JE
5 Robert De Niro 8 years 01-Jan-2000 Main/Home 34 Lawns Hall Close Adel Leeds West Yorkshire LS16 8HY
6 John Lennon 8 years 01-Dec-1999 Main/Home 12 Arncliffe House Arncliffe Road West Park Leeds West Yorkshire Ls16 5JE
7 James Kirk 10 years 11-Nov-1997
8 Jean Luc Pickard 9 years 01-Jan-1999 Main/Home 12 Arncliffe House Arncliffe Road West Park Leeds West Yorkshire Ls16 5JE
9 Angelina Jolie 8 years 01-Jan-2000
10 Paul Newman 8 years 01-Jan-2000
11 Bob Marley 8 years 11-Sep-1999 Main/Home 34 Lawns Hall Close Adel Leeds West Yorkshire LS16 8HY
12 Ilias Karayanni 8 years 11-Sep-1999
13 Von Karayan 9 years 01-Feb-1999 Main/Home 12 Brookfield Road Leeds West Yorkshire LS25 1NB
14 Giorgos Karagkounis 9 years 01-Feb-1999
15 Ryan Wolfe 8 years 01-Jan-2000
16 Rhianna Wolfe 6 years 01-Feb-2002
17 Rosie Wolfe 40 years 01-Feb-1968
18 Bill Roberts 7 years 22-Dec-2000 Main/Home 34 Lawns Hall Close Adel Leeds West Yorkshire LS16 8HY

Address Book

The **Address Book** area of **PROTOCOL** eCAF is accessed at various stages of the Process whenever a user is required to make a selection from a department, user, workgroup or when adding **Key Agencies** and **Professionals** on a child's record.

You can also access the **Address Book** from the home page by clicking on the **Address Book** link from the left hand side of the screen.



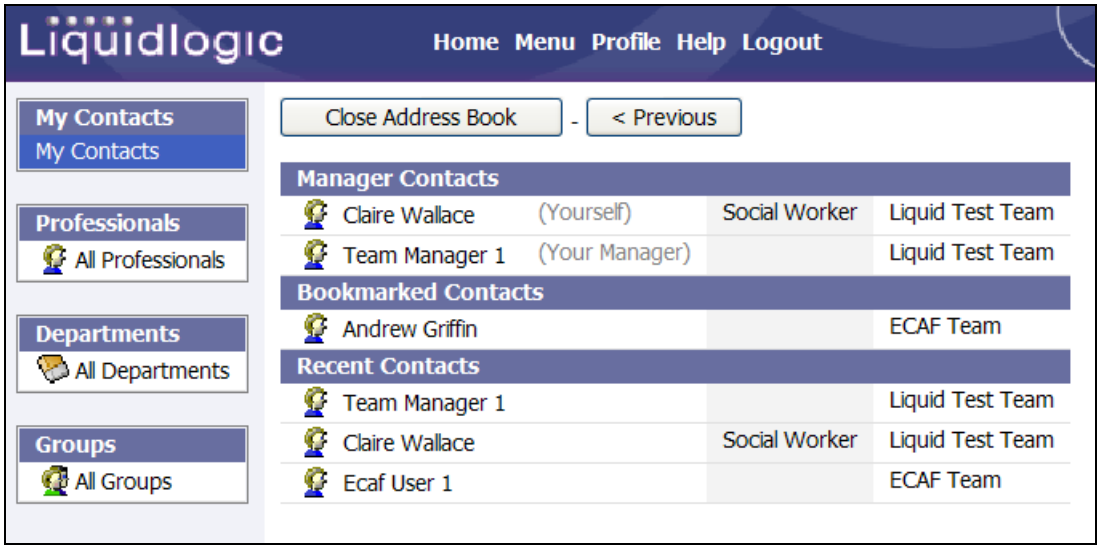
The **Address Book** link will take you to the following screen where by default you will be taken to **My Contacts.**

My Contacts

My Contacts is a section of the **Address Book** where the user can build up contacts that they may use on a regular basis. Contacts can be in the form of eCAF system users, external professionals and departments. This guide will explain how to bookmark your contacts.

My Contacts will always show 2 or 3 sections.

- Managers Contacts – This will include the user that is logged onto the system and their manager.
- Bookmarked Contacts – Any contacts the you have set up as being bookmarked (favourites)
- Recent Contacts – Any recent contacts that have been accessed and used throughout a process within the system.

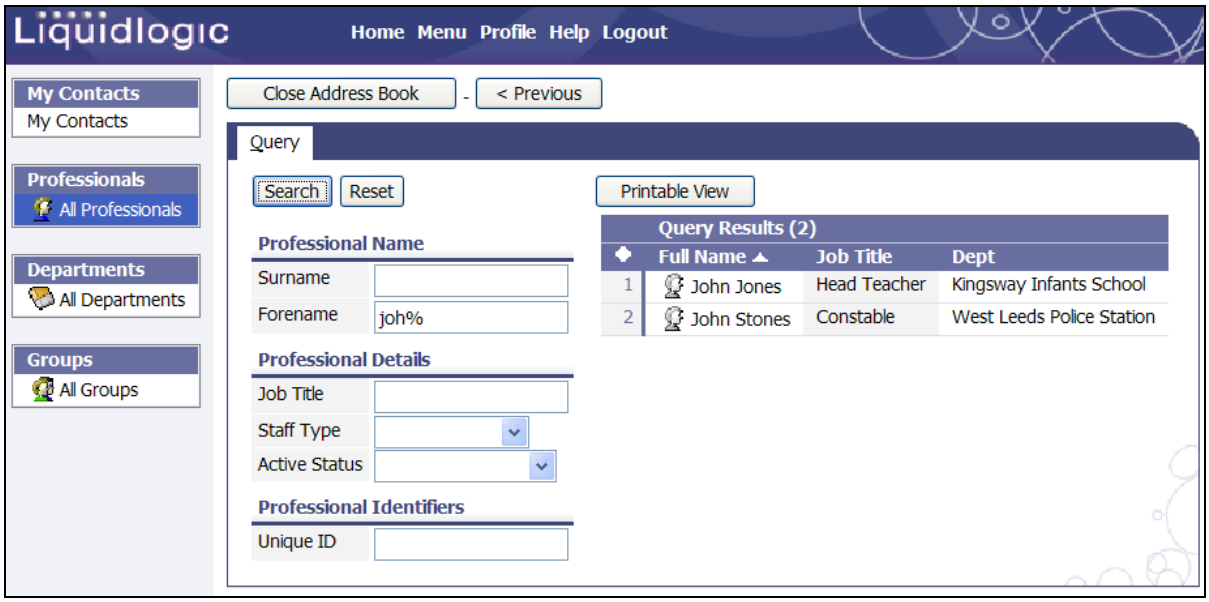


All Professionals

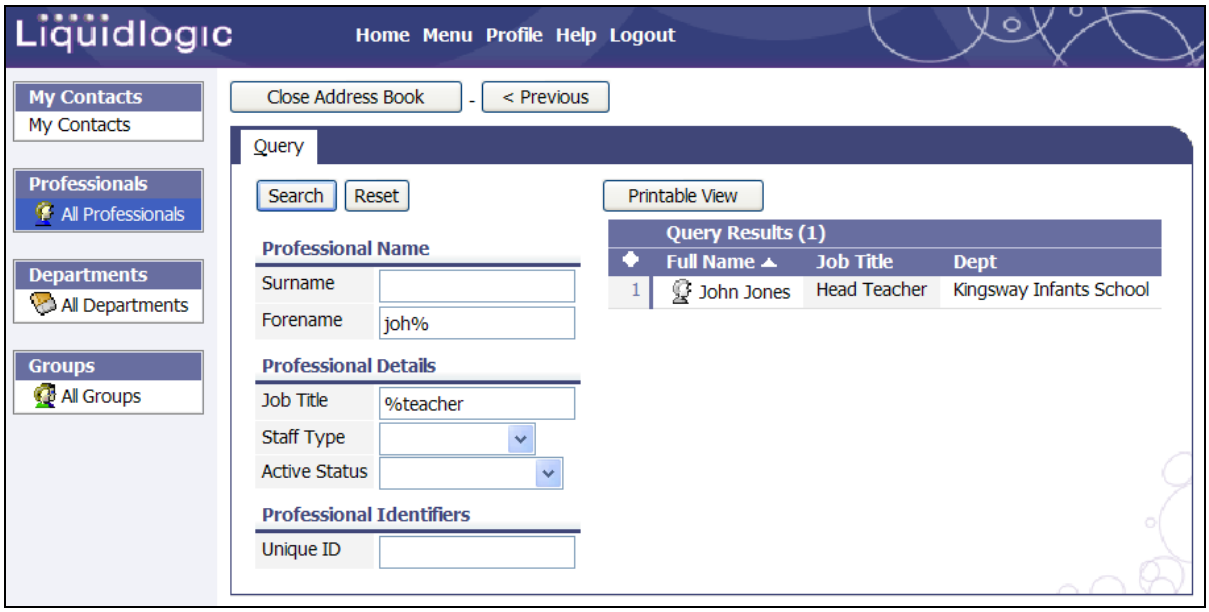
By clicking on the **All Professionals** section of the **Address Book** you will be taken to a **Query** tab where you can search the system for other professionals, either that are users within the system or external users. The **Query** tab is used in the same way as conducting a search for an adult or child in system.

To conduct a search, enter the search criteria into the relevant fields on the **Query** tab. In this example some details have been entered into the **Forename** field, 'Joh*'.

On the right hand side the **Query Results** section will bring back a list of professionals matching the criteria entered.



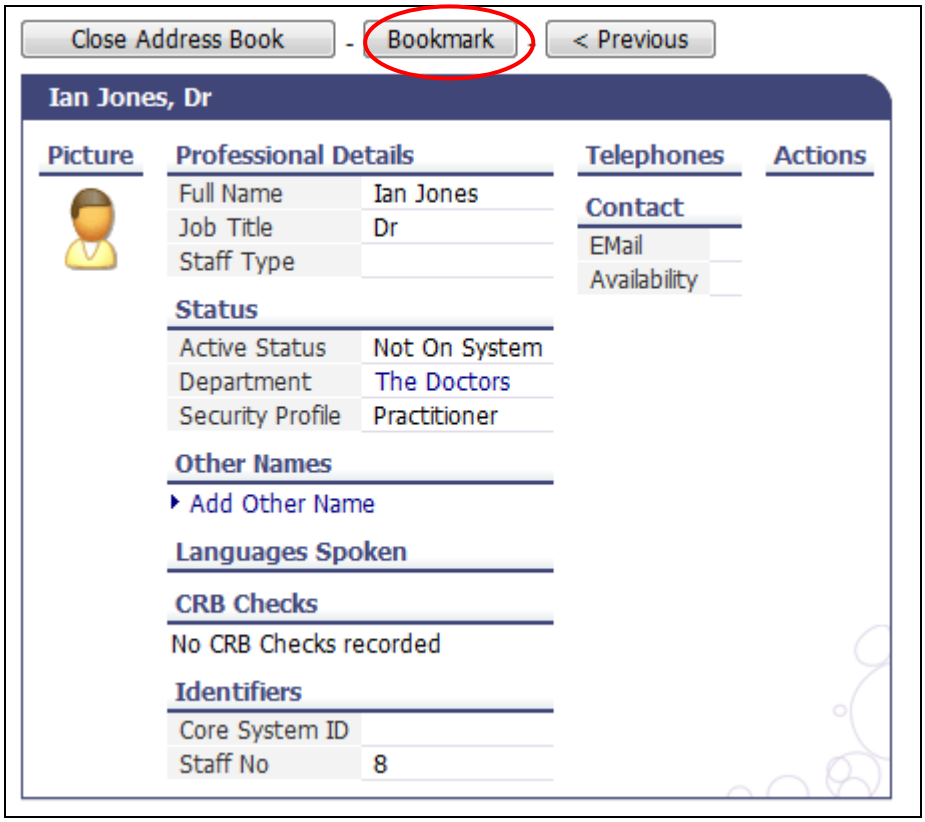
If there are many results they will be shown over a number of pages. However if further information is known the query can be amended and the search can be refreshed. In this example some details have been added to the Job Title field and the query has been run again to reduce the results.



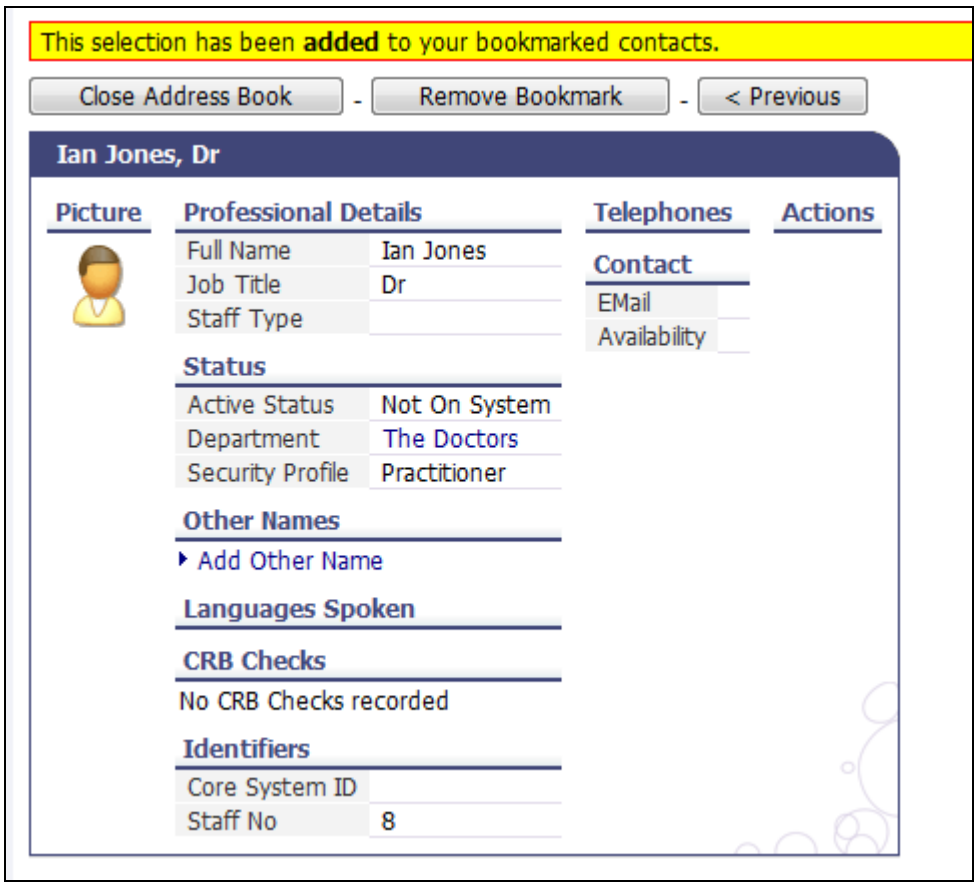
From the **Query Results** if the professional you want to select appears in the list, click on their name to open their contact details. If the professional does not appear in the list you may have to refine your search or add the professional to the system (access rights permitting).

Bookmarking a Contact

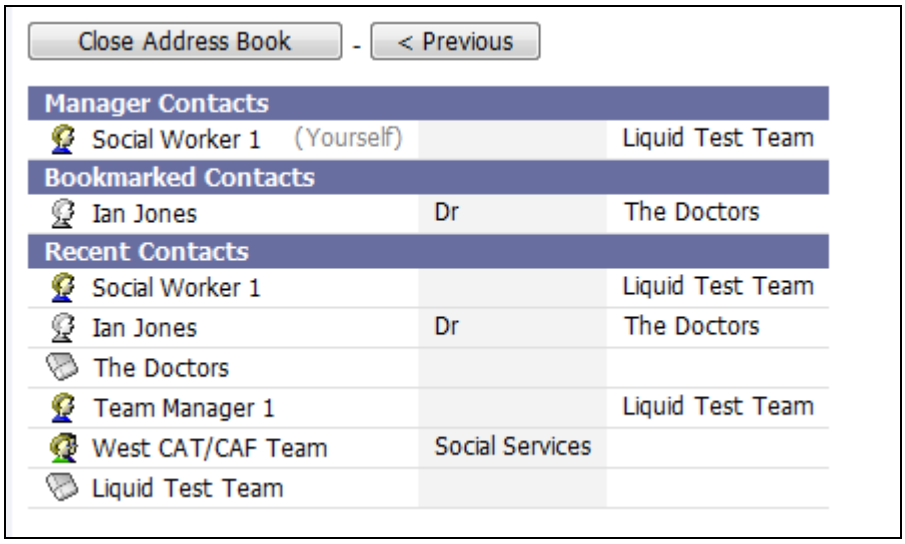
Once a professional has been selected an option of **Bookmark** will appear at the top of the screen.



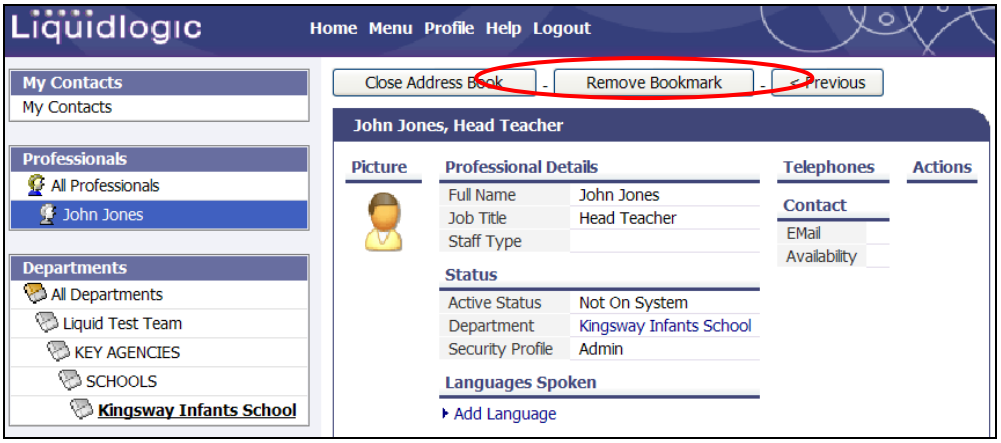
Click on **Bookmark** to add the professional to **Your Bookmarked Contacts.**



You can view all bookmarked contacts from the **My Contacts** section of the **Address Book.**



To remove a bookmarked contact from the **My Contacts** section, select the bookmarked contact and click **Remove Bookmark**.



Click **OK** to confirm removable of the bookmarked contact.

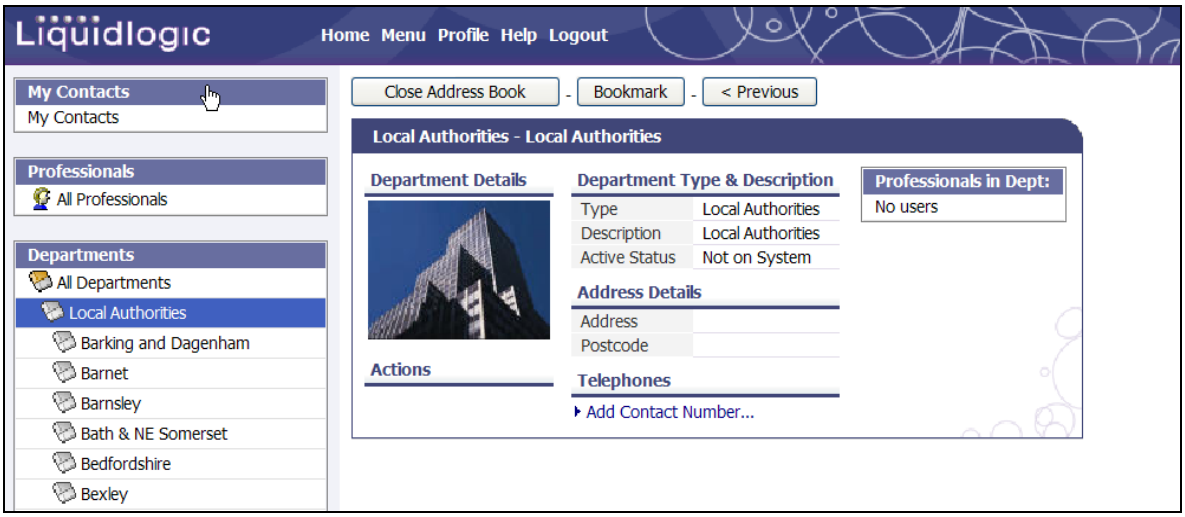
Selecting a Contact as part of a Process/Updating Demographics

If you are within a process or updating a child's demographics you will have 2 additional options:

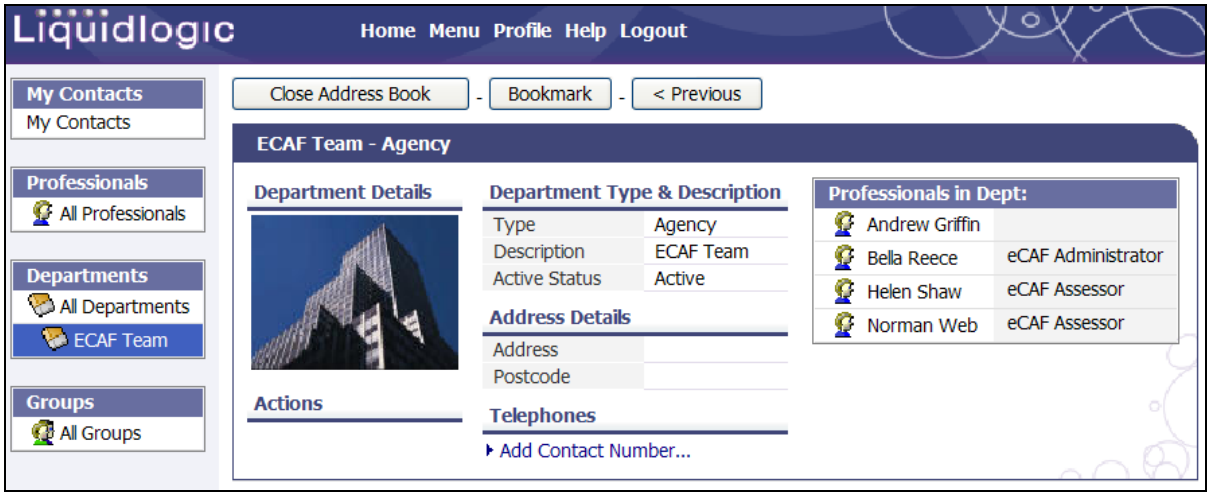
- Cancel – This will cancel you out of the address book and back to the main system
- Confirm Selection – This will select the current professional as the chosen person/department that you want to use at the stage in the process.

All Departments

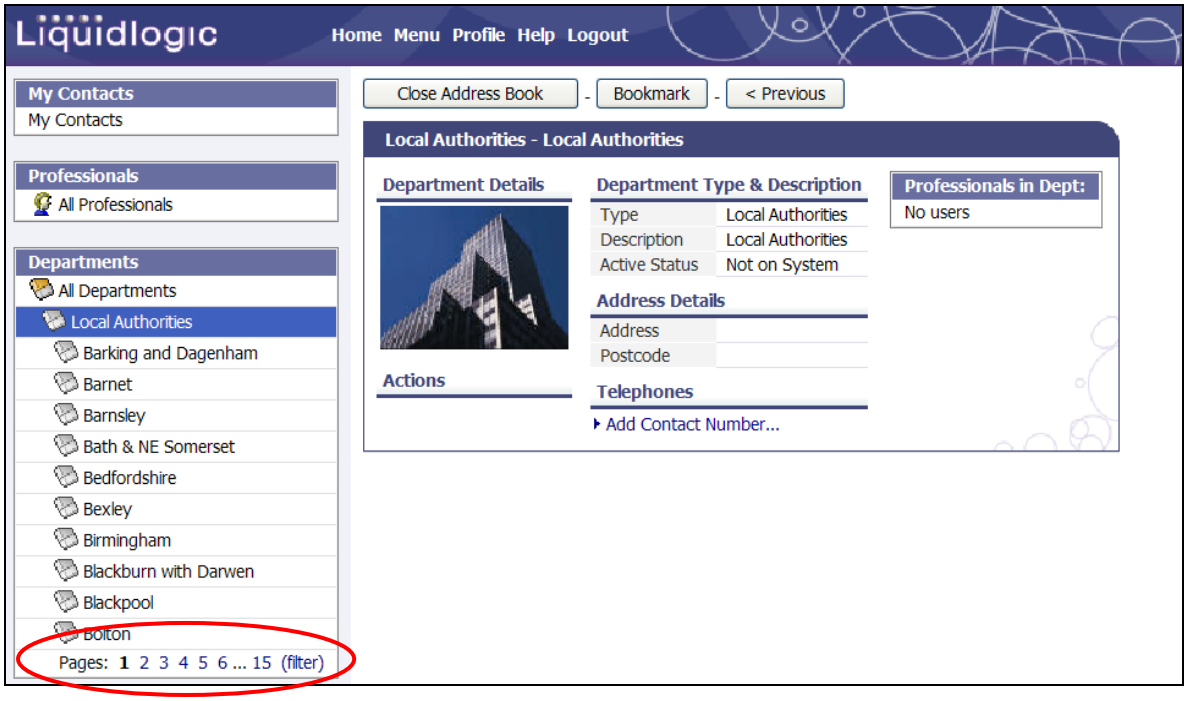
To search for a professional by department click on **All Departments,** this will list all of the departments set up within the system. If you click on any of the departments it will give you a list of sub departments, should there be any.



Once the chosen department has been selected the department details and professionals with the department will display.



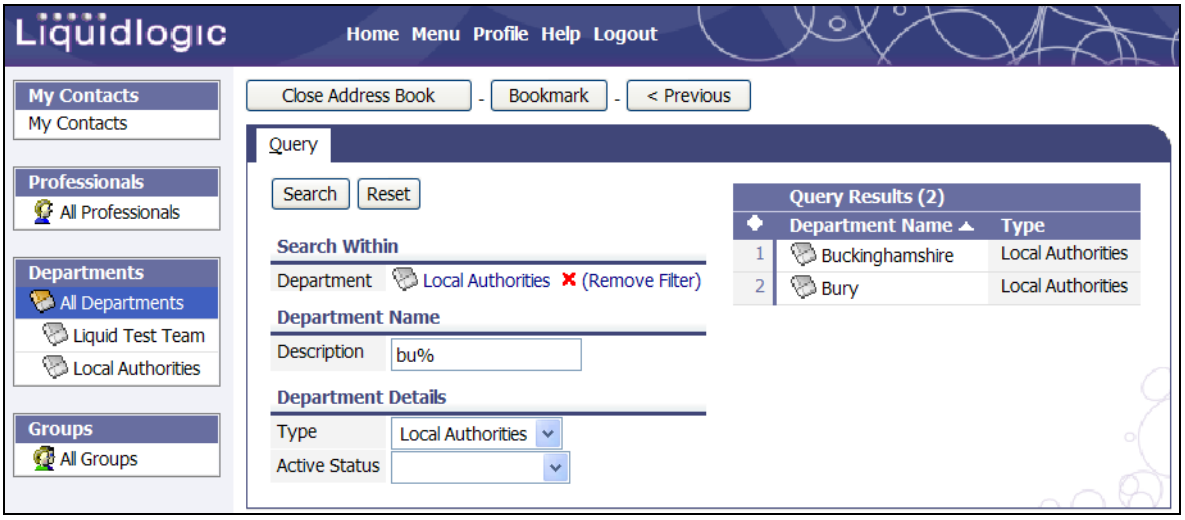
When searching on departments the system will only show 10 departments on the screen at once. At the bottom of the list there will be **Pages** section that allows you to scroll through the pages of departments.



There is also the option to **Filter** the departments. Click on **Filter** to view the **Query** tab as displayed below. This will allow you to filter on the chosen department by **Type, Active Status** and by entering part or all of the **Description.**

Please Note: If only part of the description is entered a wildcard must be used.

In this example the query results show after a filter has taken place on the **Type** of departments being matched to Local Authority and **Description** containing Bu%.

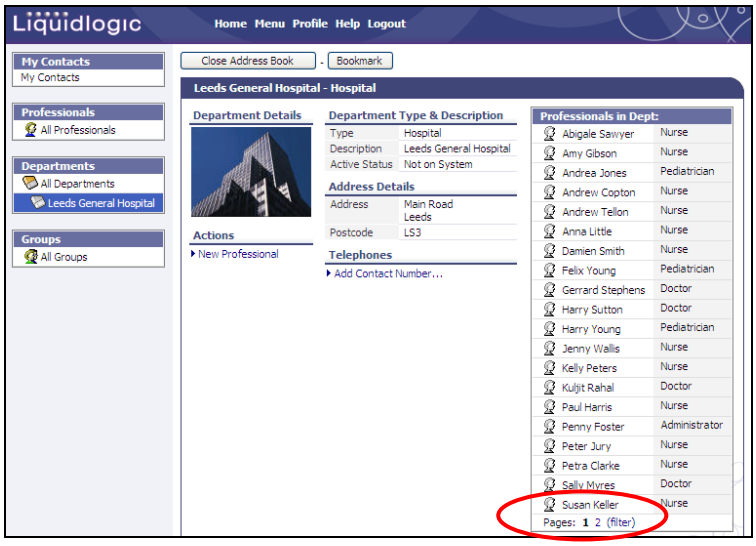


To select a department from the list click on the name of the department. This will take you to the department details and list any users within that department.

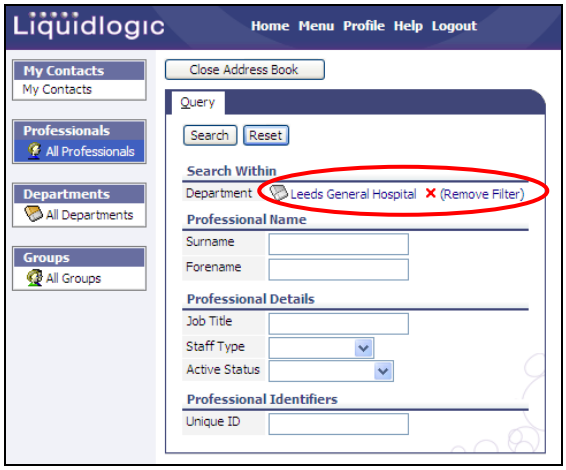
Filtering Within a Department

In this example all professional within the Leeds General Hospital department have been listed on the right hand side. Only a maximum of 20 professionals will be listed on the screen with the ability to search further pages of the department by clicking on the page number.

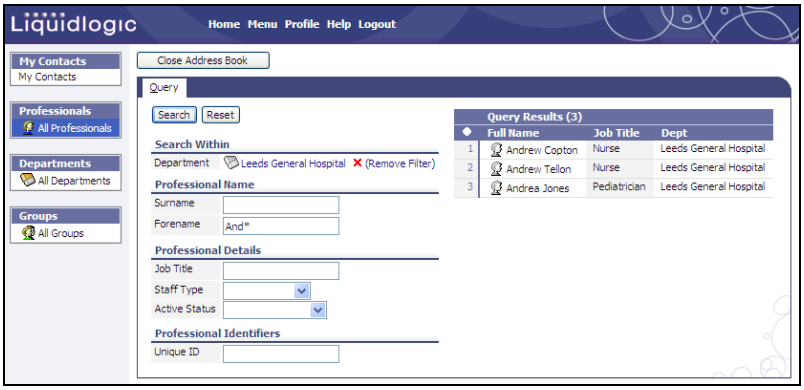
If there are a number of pages of professionals you can use the **Filter** option.



Click on the **Filter** option to be taken to the following screen. This option allows you to conduct search for a professional within a department.



The **Query** screen works in the same way as when searching using the **All Professionals** search but only searches within the filtered department.

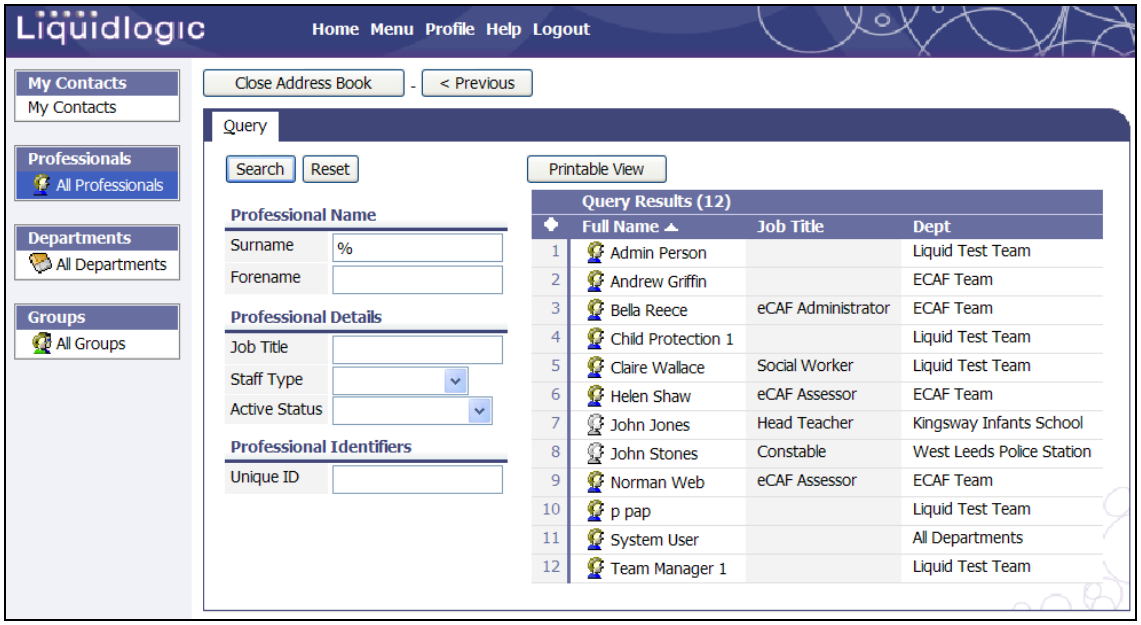


Once the filtered search has taken place, click on the professionals name to view their details.

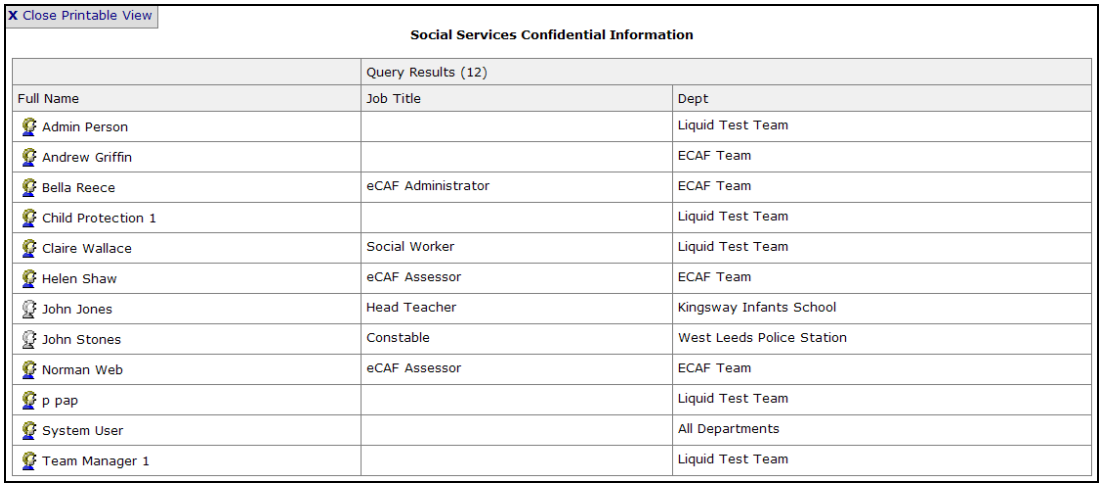
Printable View

Whilst searching for professionals, departments and organisations within the Address Book, the results of a search can be printed

Conduct a search using either the **All Departments** or **All Professionals** section. For further guidance on searching within the Address Book refer to the All Professionals or All Departments sections in this manual



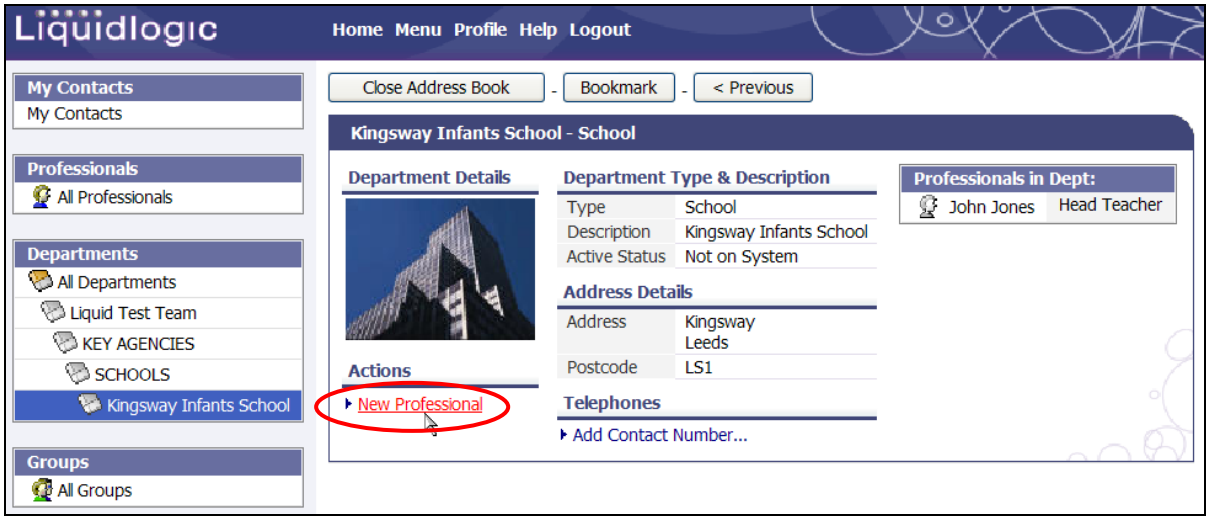
To print the results of your search click **Printable View** and then choose the print option within your web browser


Close Printable View
Social Services Confidential Information
Query Results (12)
Full Name
Job Title
Dept
Admin Person Liquid Test Team
Andrew Griffin ECAF Team
Bella Reece eCAF Administrator ECAF Team
Child Protection 1 Liquid Test Team
Claire Wallace Social Worker Liquid Test Team
Helen Shaw eCAF Assessor ECAF Team
John Jones Head Teacher Kingsway Infants School
John Stones Constable West Leeds Police Station
Norman Web eCAF Assessor ECAF Team
p pap Liquid Test Team
System User All Departments
Team Manager 1 Liquid Test Team

Adding a User to the Department

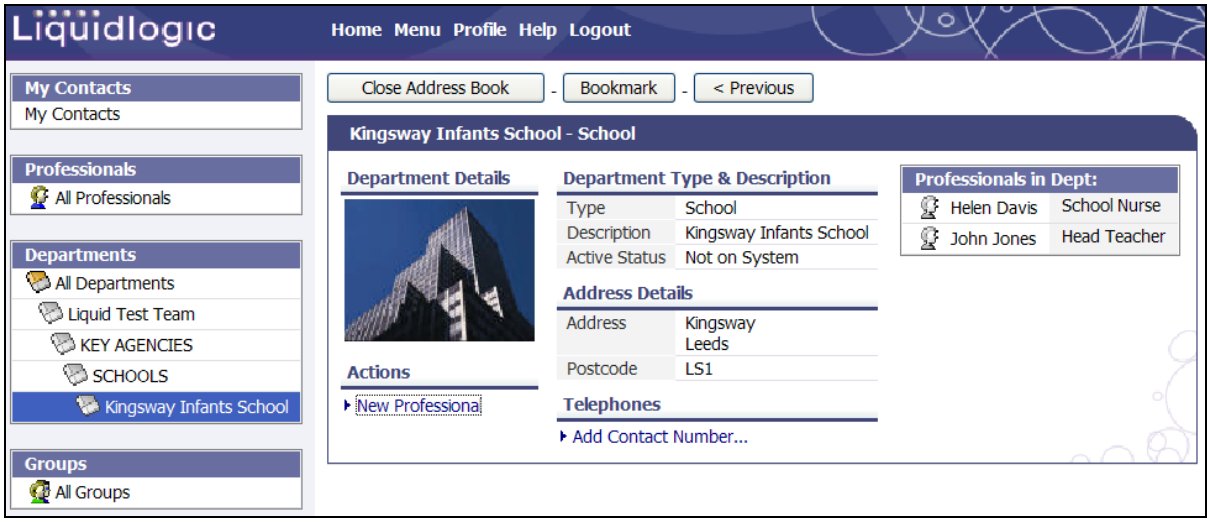
The option to add a **New Professional** to a department may be available to the user. This option is configured by the system administrator and may not be available to all users.

To add a new professional within the department click on **New Professional** from under the **Actions** section of the department details screen.



Enter the relevant details to add the professional on the system and click **Create.**

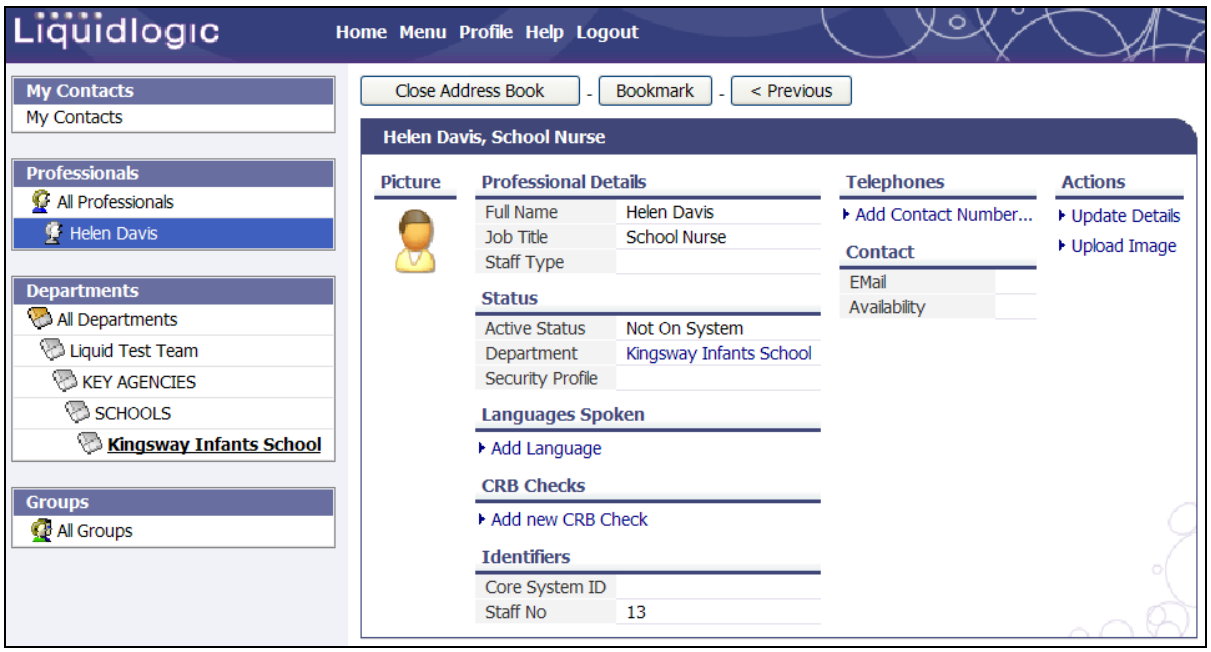
Once created the professional will now be attached to that department and will now be available when conducting a professional or departmental search for all other users to access.



Updating Professional Details

If you need to update any of the Professionals details or add further contact details for the professional you must first of all be in the professionals details.

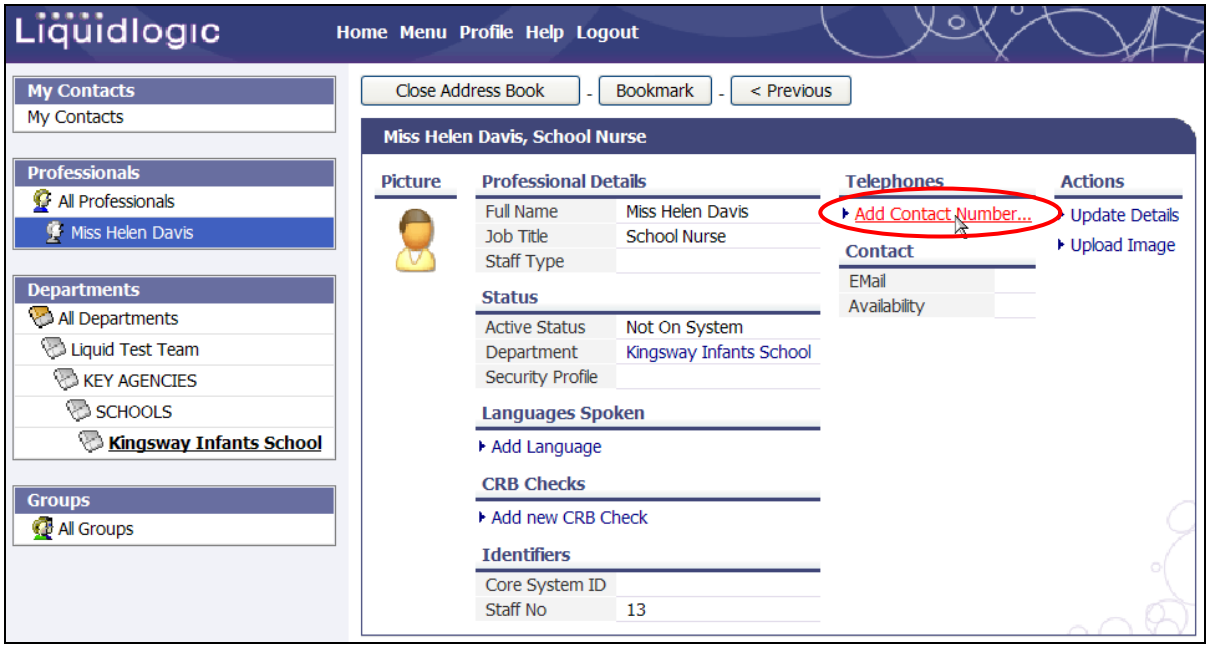
Click on **Update Details**



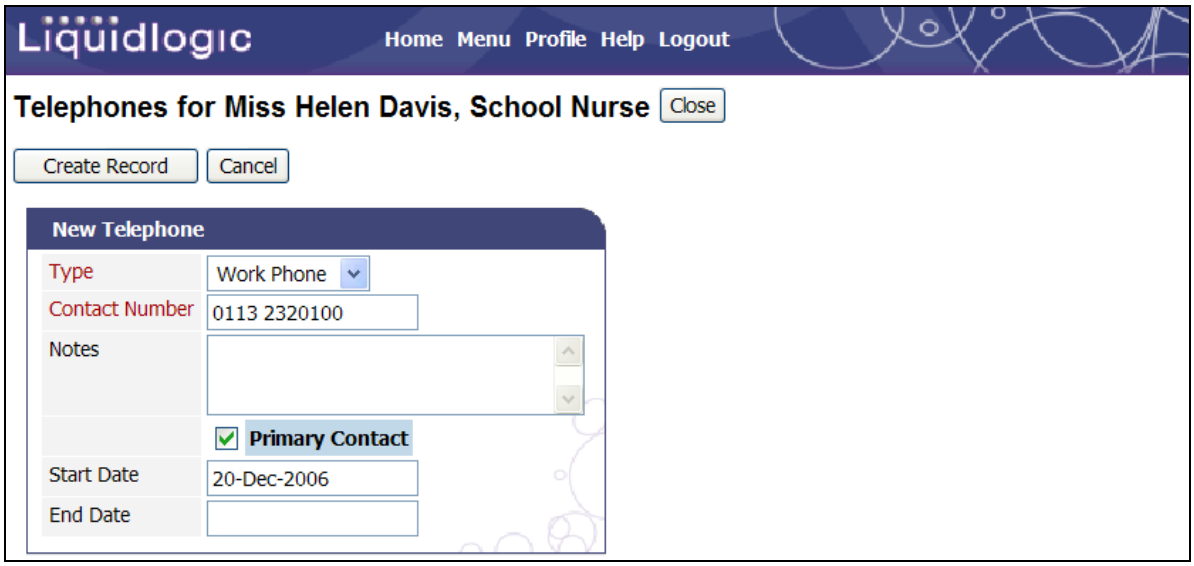
By updating the details, the original details can be amended.

To confirm the amendments, Click **Update**. You will be returned to the professional's record.

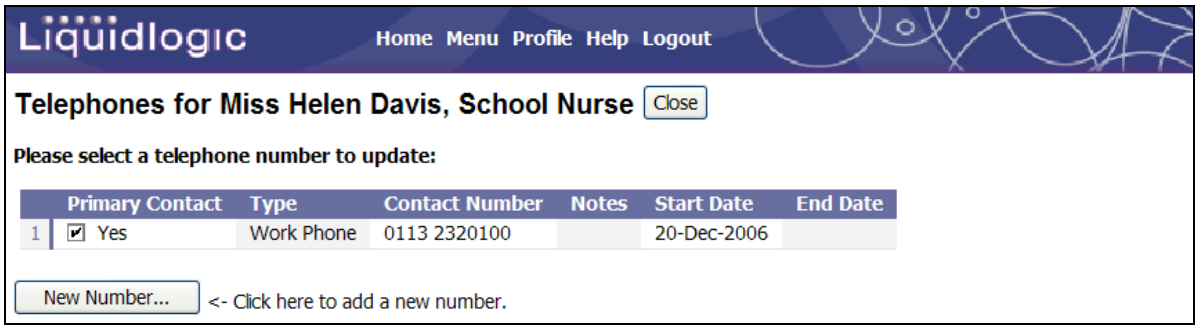
Further Contact Numbers can be added for the professional by clicking **Add Contact Number** within the **Telephones** section.



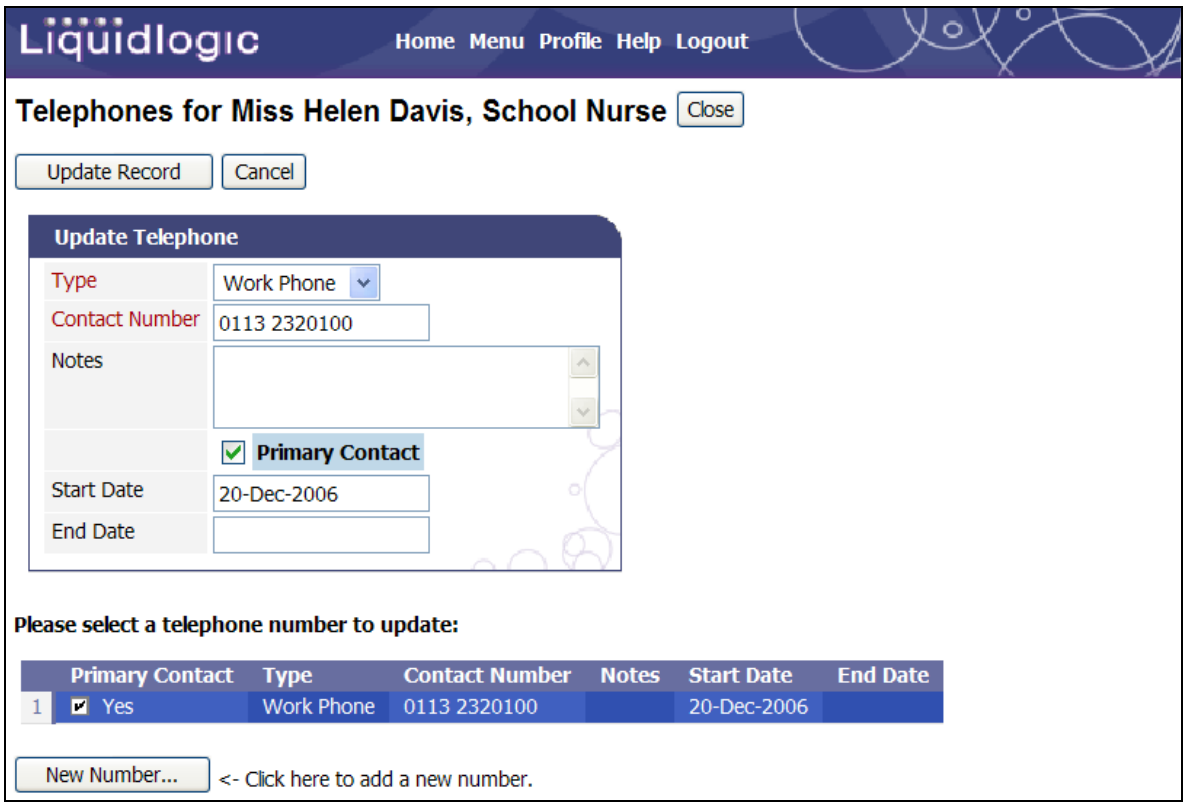
Enter the new contact number details and Click **Create Record**.



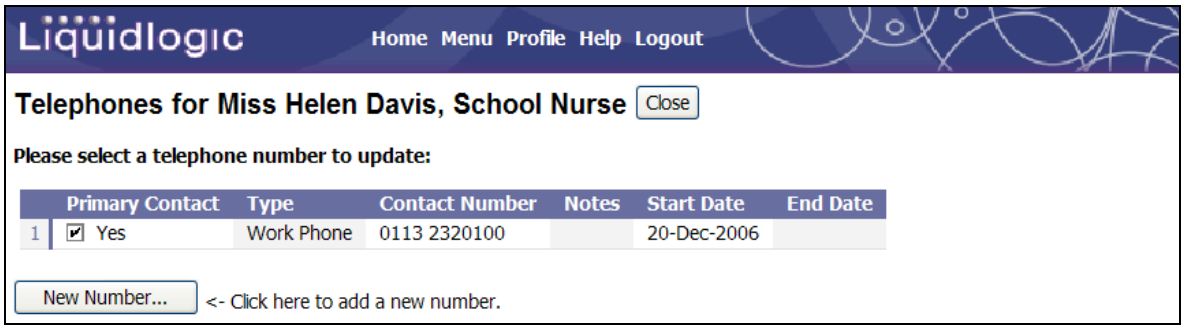
The new contact number is displayed.



To amend an existing contact number select the contact number and update the details, to apply the update Click **Update Record**.

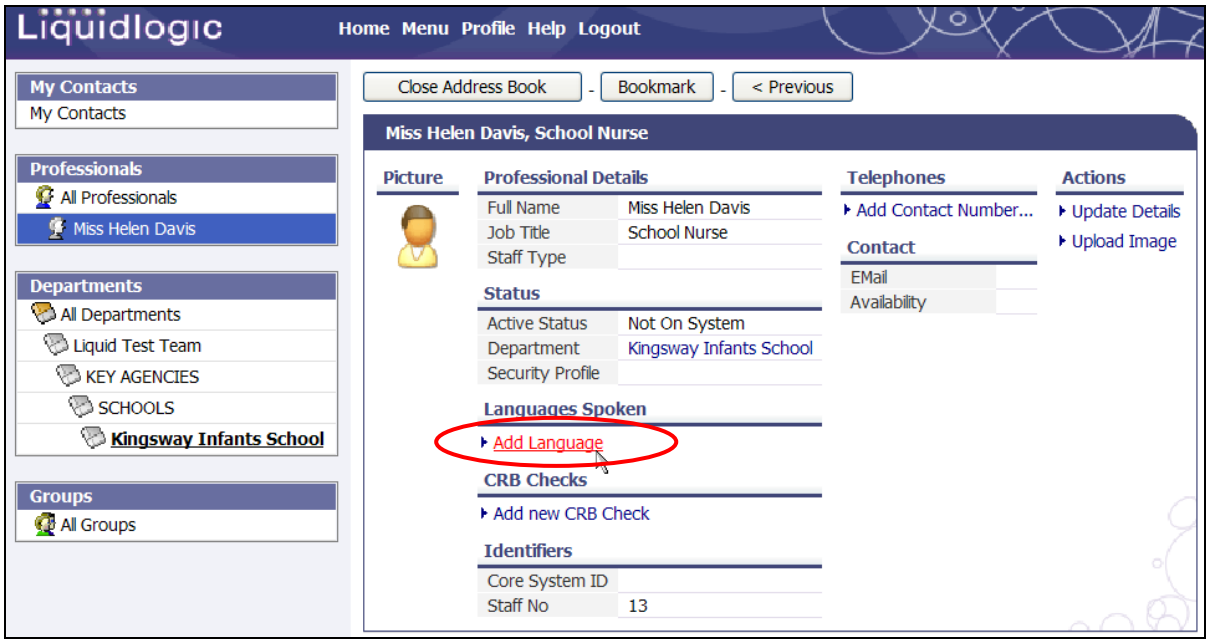


If further contact numbers need to be added to the professional at this stage then Click **New Number**, the same steps to **Add Contact number** are followed.



Add Language(s)

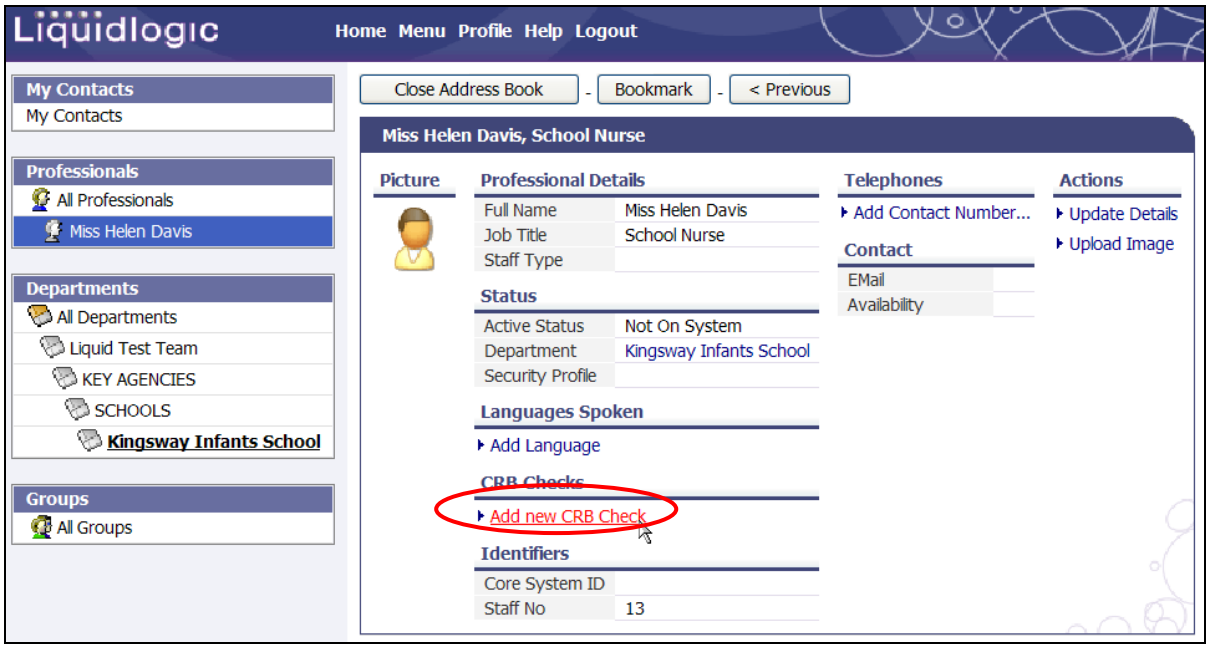
To record the language(s) spoken by professionals, click **Add Language**.



For further guidance on adding languages to a professional's details refer to earlier section **Languages Spoken** within this manual

Add CRB Check(s)

To input details of any Criminal Records Bureau (CRB) Checks performed on professionals within the address book, **Click Add new CRB Check**.

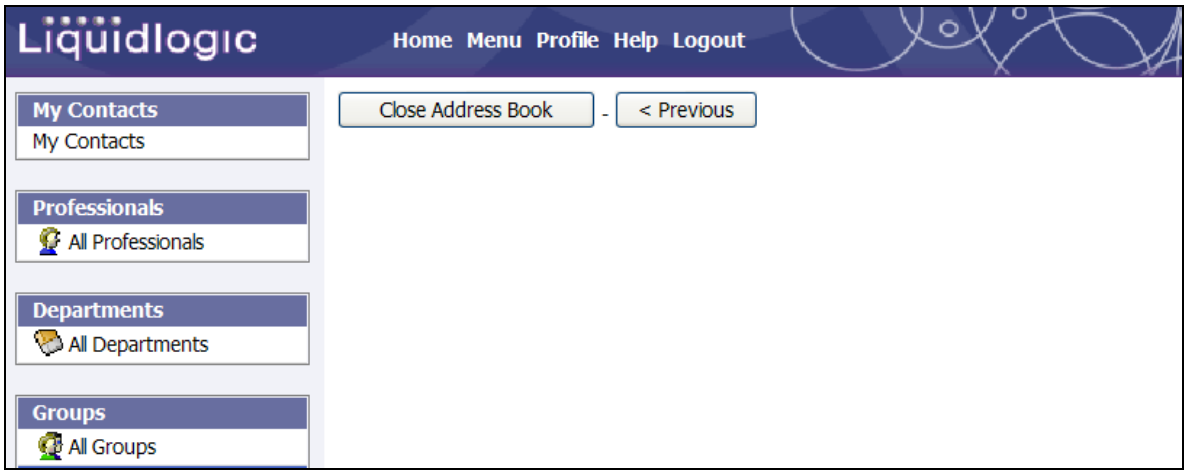


For further guidance on adding details of CRB Checks on a professional refer to earlier section **CRB Checks** within this manual

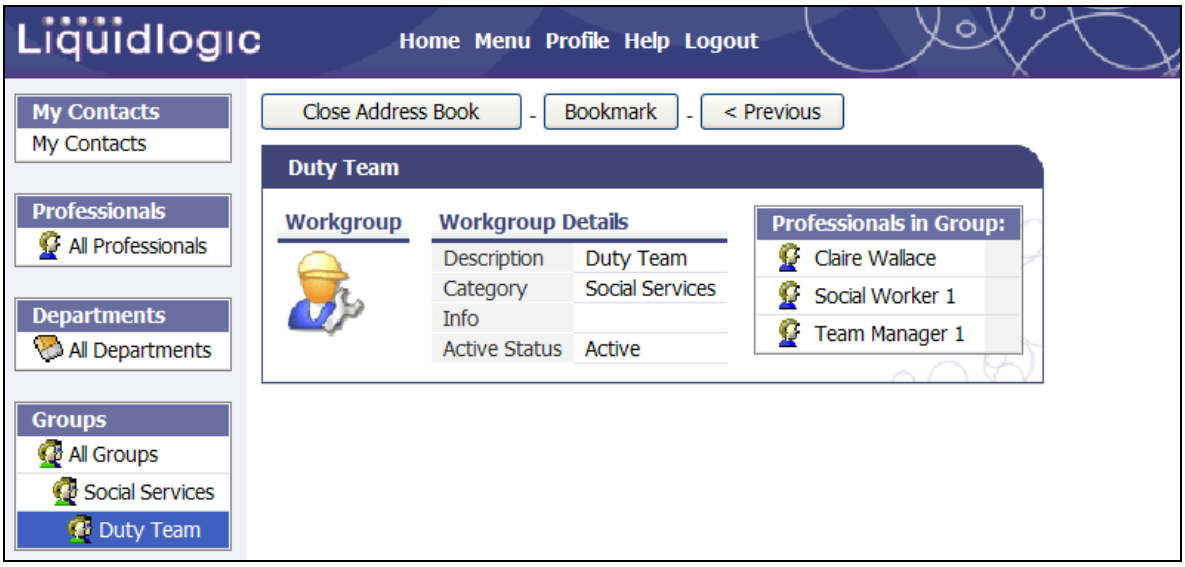
Groups

Within the system there are a number of workgroups that can be set up. For example the Duty and Assessment Teams may have their own shared workgroups. The system allows you to search for users within these groups.

Click on **All Groups** within the **Groups** section, this will open all of the groups that are set up in the system.

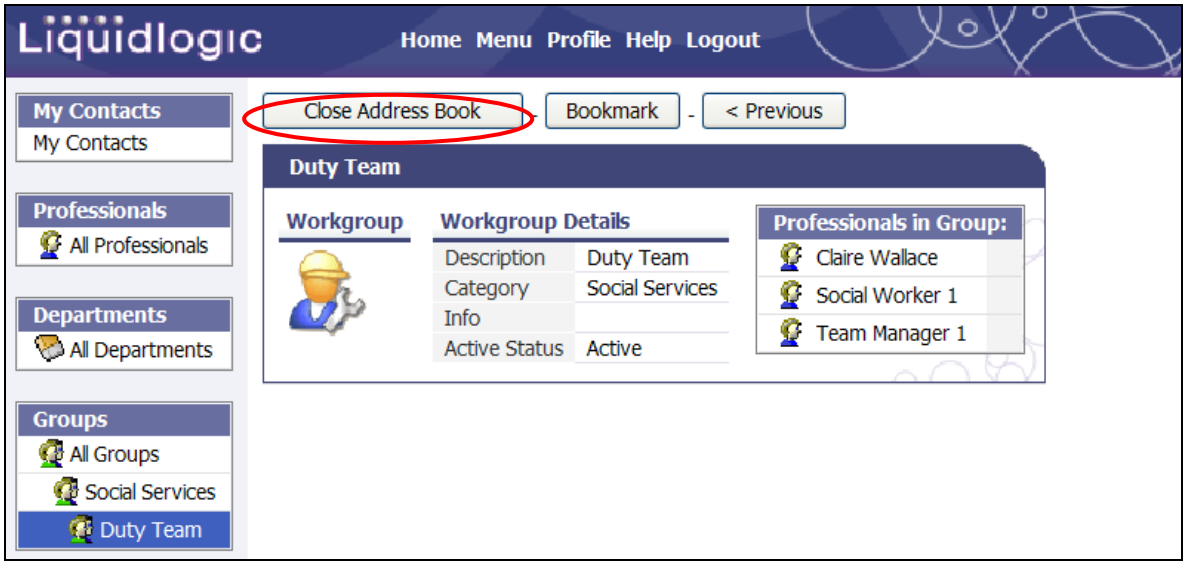


Click on the name of the group to view all professionals within the group. Click on a professional listed on the right hand side to view their details.



Closing the Address Book

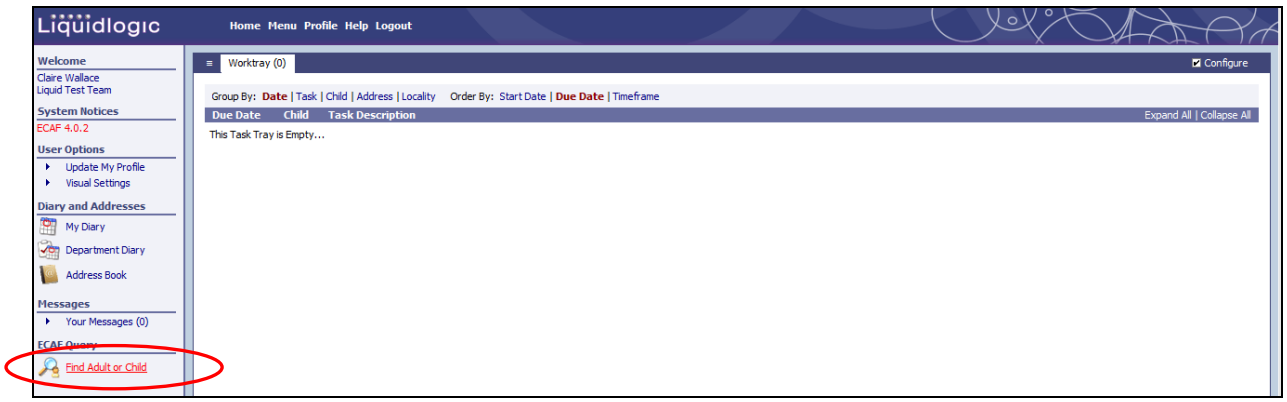
There is a link to **Close Address Book** at the top of the screen, click on this link to return to the main system.



Creating a New Person

You are only able to create a new person record if you have searched for them and no matching records exist.

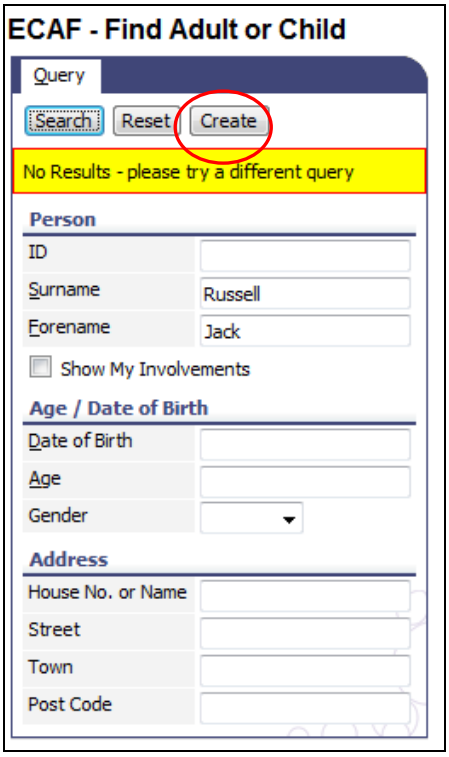
1. Select **Find Adult or Child** from the home page



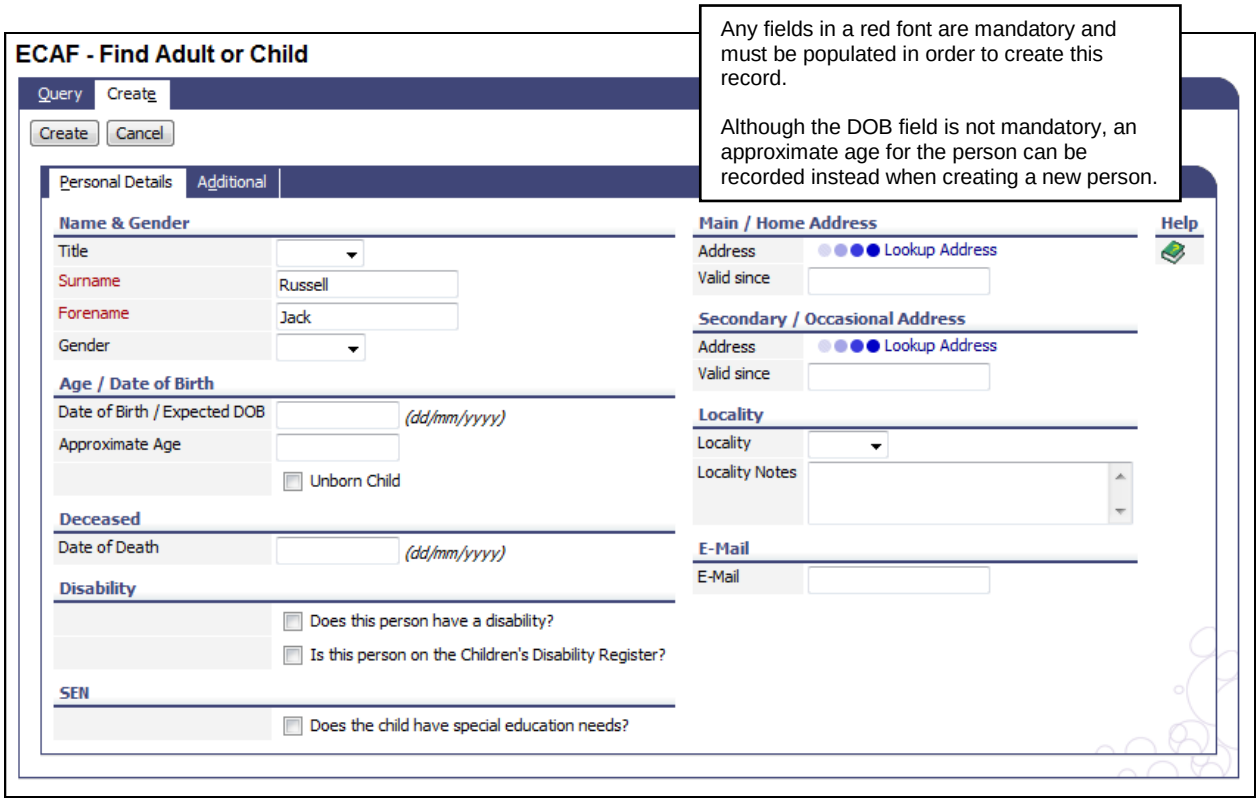
2. Enter the search criteria for the Adult or Child you want to create. Once the search has been conducted and no matching persons have been found you will be given an additional button to **Create** a new person.

For more information on conducting a search please see the section on **Searching**.

3. Click on the **Create** option

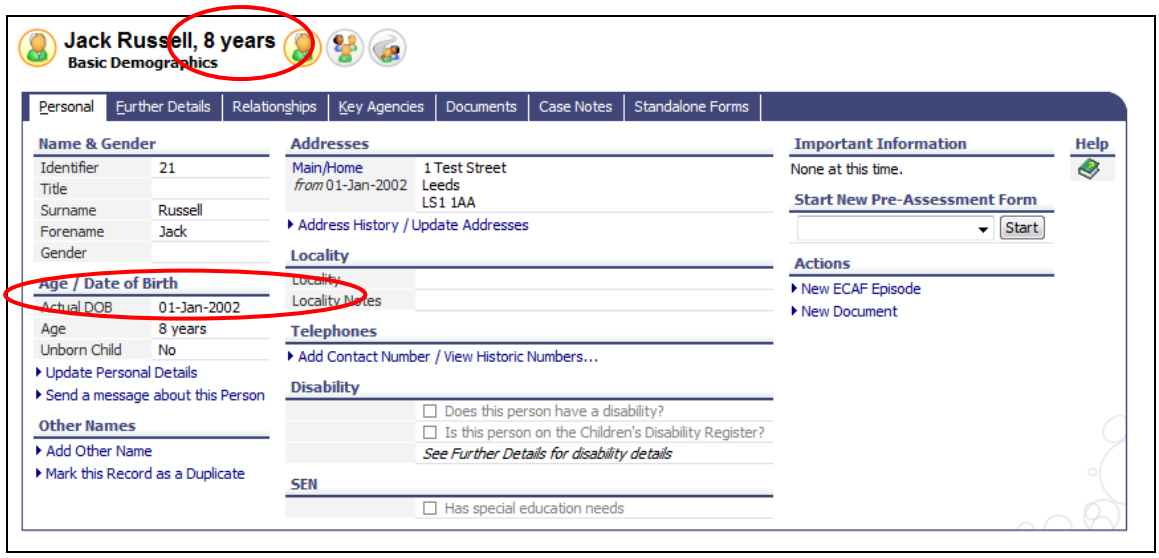


You will be taken to the following screen where information can be added to create the person.

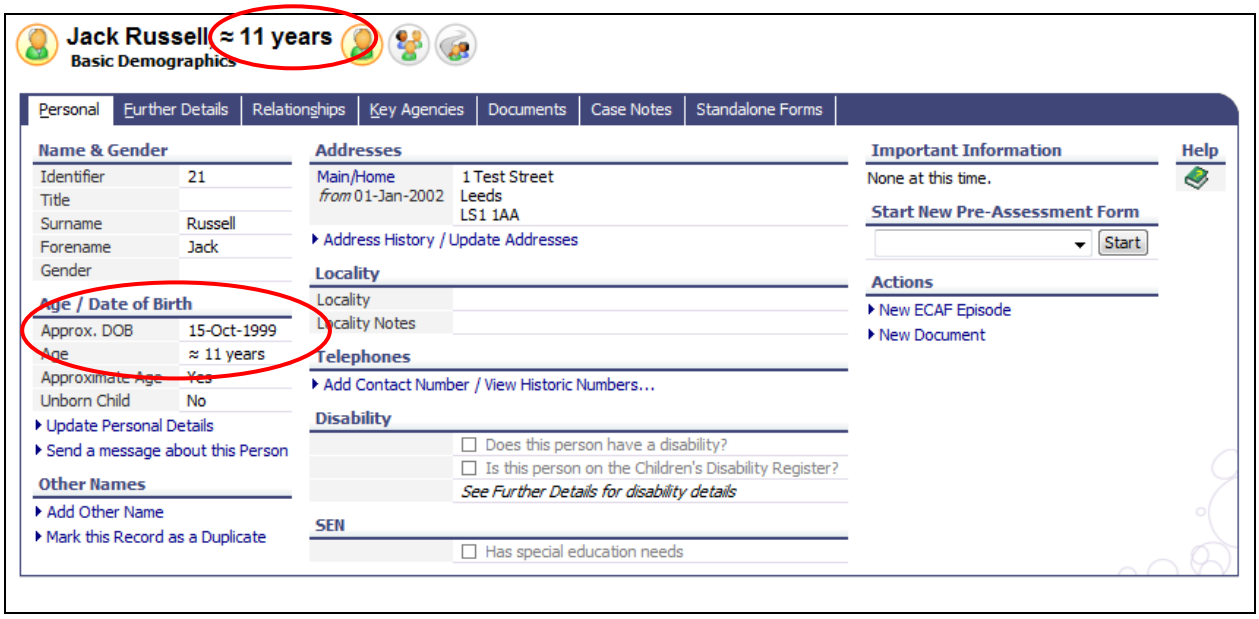


4. Enter any of the details on the screen, remembering to enter the mandatory fields.

If **Date Of Birth** is entered then the adult/child record will show the actual Date of Birth details



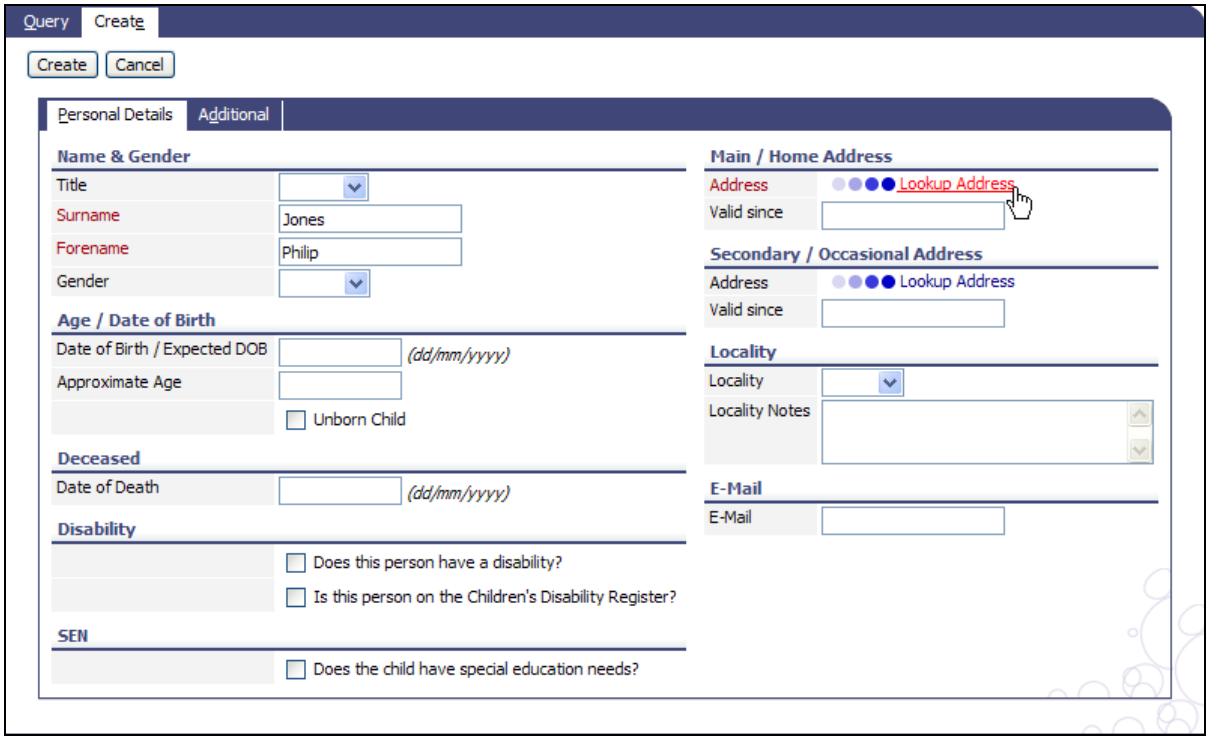
If the **Approximate Age** box is checked then the adult/child record will show that an approximate age has been recorded. This will also be represented by the ~ tilda.



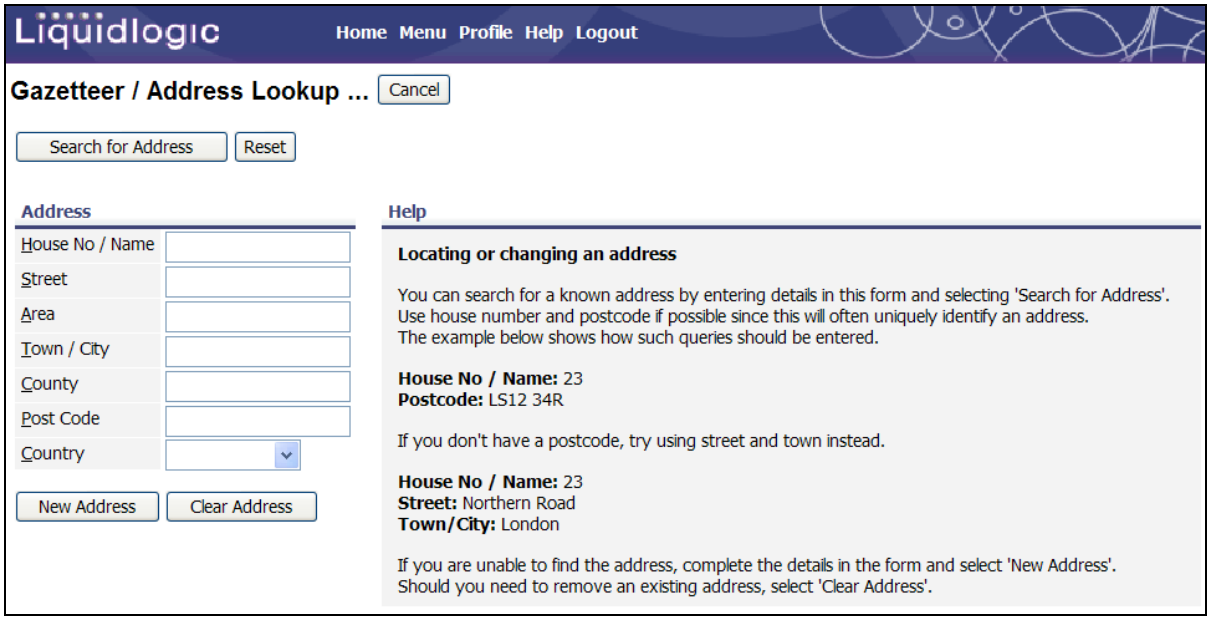
For further information on updating Date of Birth details please refer to the **eCAF Demographics** document.

Adding an Address

1. From within the **Create** screen click on **Lookup Address**

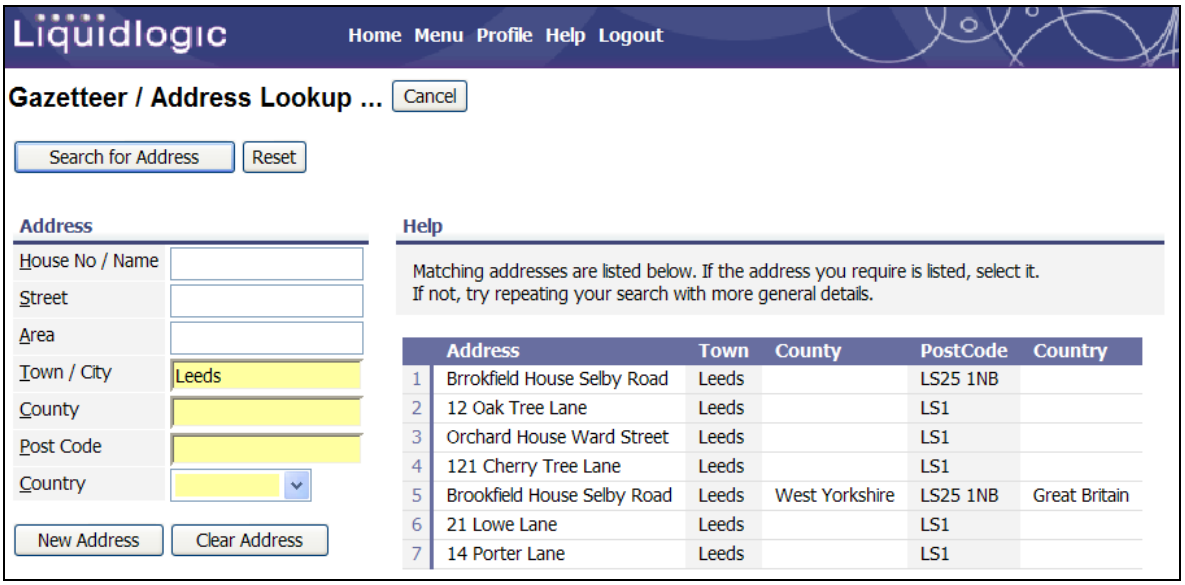


2. Enter some search criteria to find the address. The wildcard symbol can be used in any of the search fields to replace one or more characters
3. Click **Search for Address**. This will return a list of results matching the search criteria entered

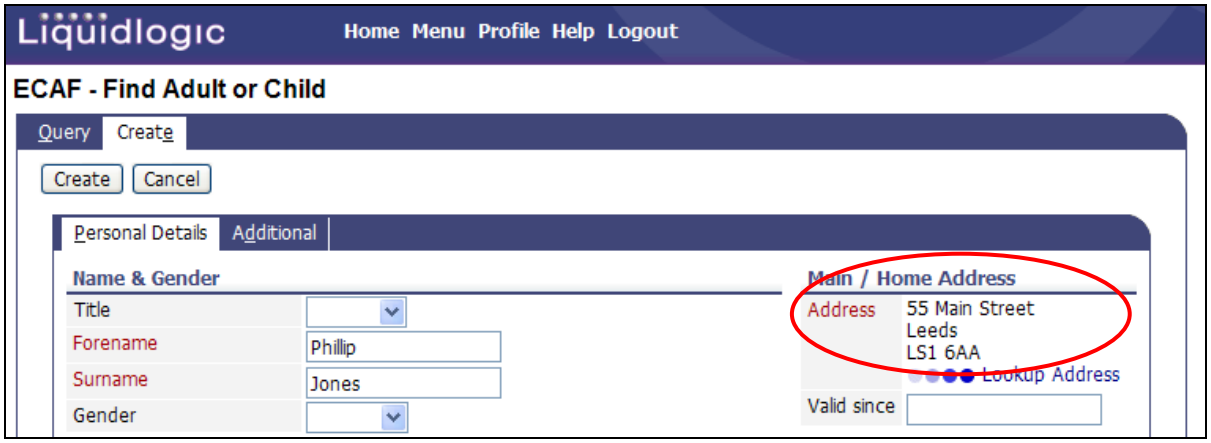

Liquidlogic
Home Menu Profile Help Logout
Gazetteer / Address Lookup ...
Cancel
Search for Address
Reset
Address
House No / Name
Street
Area
Town / City
County
Post Code
Country
New Address
Clear Address
Help
Locating or changing an address
You can search for a known address by entering details in this form and selecting 'Search for Address'.
Use house number and postcode if possible since this will often uniquely identify an address.
The example below shows how such queries should be entered.
House No / Name: 23
Postcode: LS12 34R
If you don't have a postcode, try using street and town instead.
House No / Name: 23
Street: Northern Road
Town/City: London
If you are unable to find the address, complete the details in the form and select 'New Address'.
Should you need to remove an existing address, select 'Clear Address'.

For more information on using wildcards see the section on **Searching**.

4. To select one of the addresses from the list, click on the address


Liquidlogic
Home Menu Profile Help Logout
Gazetteer / Address Lookup ...
Cancel
Search for Address
Reset
Address
House No / Name
Street
Area
Town / City
Leeds
County
Post Code
Country
New Address
Clear Address
Help
Matching addresses are listed below. If the address you require is listed, select it.
If not, try repeating your search with more general details.
Address Town County PostCode Country
1 Brrokfield House Selby Road Leeds LS25 1NB
2 12 Oak Tree Lane Leeds LS1
3 Orchard House Ward Street Leeds LS1
4 121 Cherry Tree Lane Leeds LS1
5 Brookfield House Selby Road Leeds West Yorkshire LS25 1NB Great Britain
6 21 Lowe Lane Leeds LS1
7 14 Porter Lane Leeds LS1

The address will be displayed within the Create record screen:

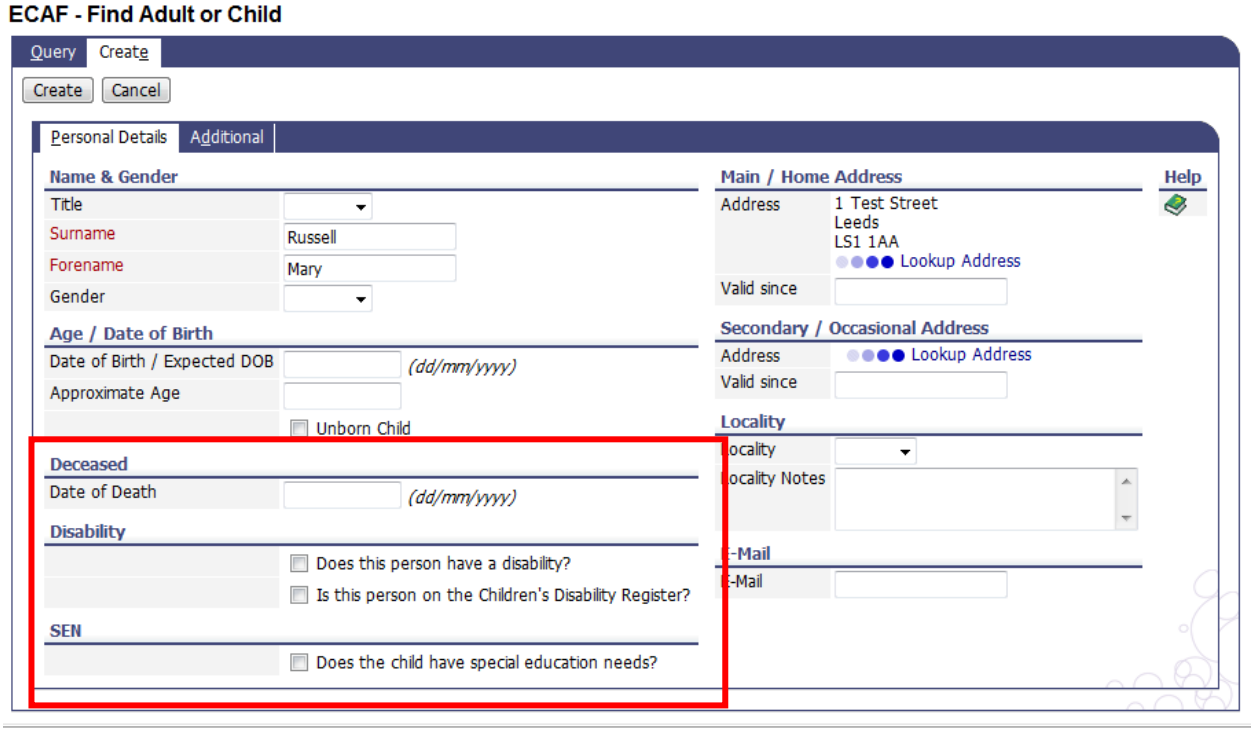


If the address is not listed in the results you may need to refine your search criteria. To amend the original criteria click on **Reset**.

If you are unable to find the address then contact your System Administrator to arrange to have the address created.

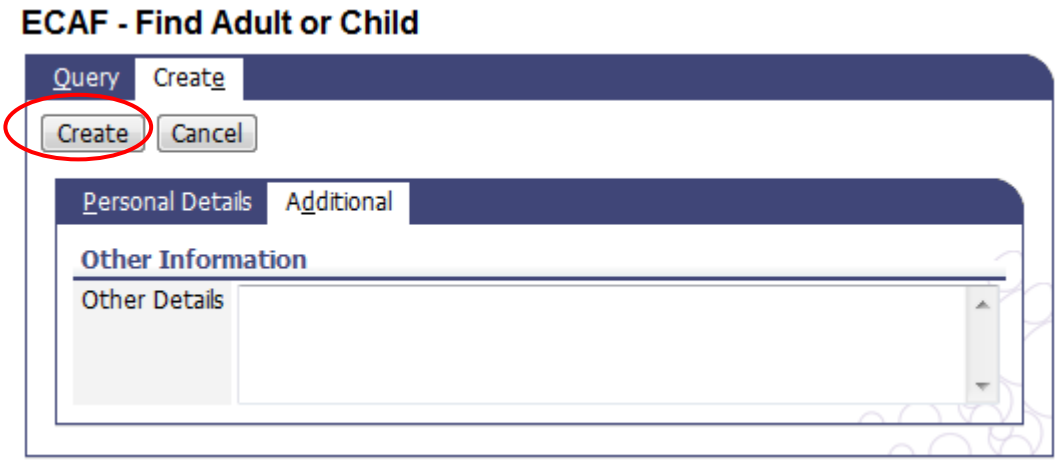
Adding Other Personal Details

On creating the person record other details such, Disabilities can be added, although not marked as a mandatory field.



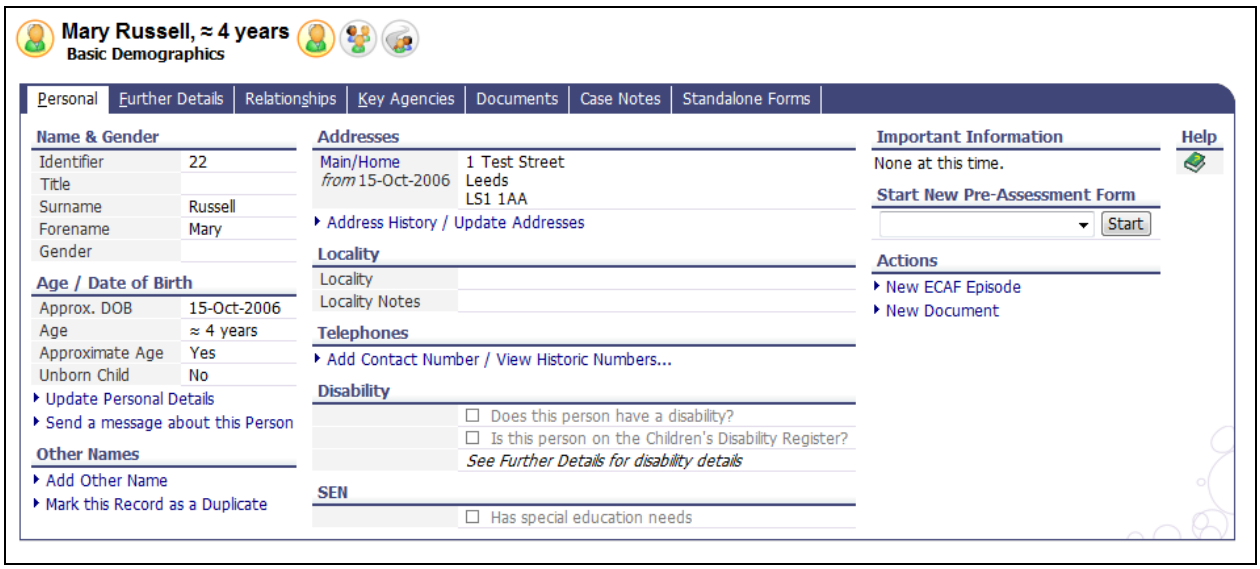
Additional tab

Clicking on the Additional tab allows you to add any other information (this information can then be viewed when updating the personal details from the demographics screen.)



5. Click **Create** to create the child's record on the system.

This will create a new person record. If you need to update or add to any of the information that you have added for a person you can update their record by selecting **Update Personal Details** from the child's **Personal** or **Further Details** tab:



For more information on updating the child's record please refer to the **Updating Personal Details** section within the **eCAF Demographics** user manual.